Reporting for Contact Center Setup and Operations Guide

BCM
Contact Center

Document Number: NN40040-302
Document Status: Standard
Document Version: 05.01
Date: September 2006

NORTEL

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How to Use this Guide 1

Introduction

This guide is designed to allow an Administrator or User to set up and operate Nortel Reporting for Contact Center.

How this guide is organized

The *Reporting for Contact Center Setup and* Operations Guide is organized as follows:

How to Use this Document	Provides a brief overview identifying the organization of this guide. This also details how to get help from Nortel.
Introduction	Provides an overview of the conceptual organization of the Nortel Reporting for Contact Center product.
Installation	Describes the minimum specification for the Personal Computer (PC) required that hosts the Nortel Reporting for Contact Center software. It also describes how to install Nortel Reporting for Contact Center and the Contact Center Reporting Server for BCM50 2.0.
Administration	Describes the required administration duties and configuration to ensure that Nortel Reporting for Contact Center operates correctly.
Using Reporting for Contact Center	Describes the use and configuration of Nortel Reporting for Contact Center from a user's perspective.
Reports	Describes the reports that are available within Nortel Reporting for Contact Center.
Glossary	Describes the terms used in this guide.
References	Lists documents referenced in this guide.
Index	Provides a cross-reference of topics in this guide.

How to get Help

This section explains how to get help for Nortel products and services.

Getting Help from the Nortel Web site

The best source of support for Nortel products is the Nortel Support Web site:

http://www.nortel.com/support

This site enables customers to:

- Download software and related tools
- Download technical documents, release notes, and product bulletins
- Sign up for automatic notification of new software and documentation
- Search the Support Web site and Nortel Knowledge Base
- Open and manage technical support cases

Getting Help over the phone from a Nortel Solutions Center

If you have a Nortel support contract and cannot find the information you require on the Nortel Support Web site, you can get help over the phone from a Nortel Solutions Center.

In North America, call 1-800-4NORTEL (1-800-466-7835).

Outside North America, go to the following Web site and look up the phone number that applies to your region:

http://www.nortel.com/callus

When you speak to the phone agent, you can reference an Express Routing Code (ERC) to route your call more quickly to the appropriate support specialist. To locate the ERC for your product or service, go to:

http://www.nortel.com/erc

Getting Help through a Nortel distributor or reseller

If you purchased a service contract for your Nortel product from a distributor or authorized reseller, you can contact the technical support staff for that distributor or reseller.

Introduction 2

Nortel Reporting for Contact Center is a browser-based Real Time information and Historical Reporting tool for the Nortel Contact Center.

Nortel Reporting for Contact Center provides:

- Real Time windows showing current Contact Center activity for calls and for agents
- Real Time information through hardware and software IP-enabled wallboards
- A comprehensive Historical Reporting package

!	In this document, the phrase *the Contact Center platform* is used to refer to either the Business Communications Manager or the CallPilot hardware, and the phrase *the Contact Center* is used to refer to the Contact Center application running on that platform. The platforms are referenced specifically by name in areas of this document such as those that describe the information concerning the configuration of the Contact Center Connection page (page 58).

Web-Based User Interface

All the administrative and user interactions with Nortel Reporting for Contact Center are conducted through a series of Web pages that are accessed through Internet Explorer browser sessions.

The Web pages are hosted on a designated PC, referred to as the Web Host PC, on which the Nortel Reporting for Contact Center software is installed. The Web Host PC communicates directly with the Contact Center to retrieve Real Time updates (for the Real Time screens and wallboards) and Historical information (for the reports).

Other PCs that have network access to the Web Host PC can access these Web pages. Multiple users can, therefore, use Nortel Reporting for Contact Center without having any software other than Internet Explorer installed on their PCs. (The Java runtime environment, if required, and the Crystal Reports ActiveX report viewer are automatically downloaded to the client the first time they are required.)

Language Support

Each Administrator or User of Nortel Reporting for Contact Center can specify to view their Web user interface pages in one of the following 13 languages: North American English, United Kingdom English, Canadian French, Latin American Spanish, Brazilian Portuguese, Spanish, Dutch, French, German, Italian, Norwegian, Danish, and Swedish.

Each Administrator or User can also view individual wallboards in any of these languages.

Administrators and Users

The two types of Nortel Reporting for Contact Center users are Administrators and Users.

In addition to having access to all the features of Nortel Reporting for Contact Center, Administrators can specify and change fundamental configuration settings within Nortel Reporting for Contact Center.

For security purposes and to maintain system stability, only Users with Administrator capabilities can change the fundamental configuration settings. User interactions with Nortel Reporting for Contact Center are limited to using the features that it provides.

While Users cannot modify the core setup of Nortel Reporting for Contact Center, they can specify and change some personal preferences. Users can also configure any aspects of Nortel Reporting for Contact Center that affect only themselves.

Administrators and Users view different menus when they log in.

Assigned Skillsets

Administrators create Users by providing details, such as User Name and language, to Nortel Reporting for Contact Center. The Administrator must then assign Skillsets to Users.

The process of assigning Skillsets defines the Skillsets that each User can view in the Real Time screens and for which the User can request Historical Reports. Skillsets can be assigned to more than one User.

Users can choose to view the Real Time screens or Historical Reports for any of the Skillsets assigned to them, any combination of the allocated Skillsets, or all the assigned Skillsets.

Users, including the Administrator, can save frequently used Selections of Skillsets as Favorites and assign names to the Favorites. The User can then, with a single mouse click, quickly locate a Skillset selection. Favorites are unique to each User. Users can create, modify, or delete their Favorites without affecting the Favorites of other Users.

SQL Historical Database

Historical Report information is stored in a standard MySQL database. If Users have reporting requirements that are not available through Nortel Reporting for Contact Center, they can analyze the data using third-party reporting packages.

System Software

The software that sends data to Nortel Reporting for Contact Center is integral to the Nortel Contact Center.

Nortel Reporting for Contact Center software on the Web Host PC communicates directly with the Contact Center to request Contact Center Historical Report statistical data and Real Time data.

Users on other PCs can access the Real Time and Historical Report data by pointing their Internet browsers to the Nortel Reporting for Contact Center Web pages on the Web Host PC. Only the Web Host PC needs to communicate with the Contact Center.

!	One PC on your network should be designated as the Web Host PC. Install the Nortel Reporting for Contact Center application software onto the designated PC only. Ensure that the PC with CCRS installed for BCM50 2.0 is switched on at all times when the Contact Center is running so that all statistics are collected. If it is not switched on this will result in a loss of call data. All other network PCs from which Users access the Real Time screens, Historical Reports, or the Nortel Reporting for Contact Center user interface must be equipped with Internet Explorer. No other software is required on these PCs.

PC Requirements

The minimum recommended requirements for the PC designated as the Nortel Reporting for Contact Center Web Host PC for BCM 4.0 and for BCM50 2.0 without the Contact Center Reporting Server (CCRS) installed on the Web Host PC are as follows:

Recommended Minimum PC Specification for BCM 4.0 and BCM50 2.0

IBM™ Compatible PC

Microprocessor
Intel® Pentium™ IV (or equivalent) minimum

Microprocessor Speed
1.7 GHz minimum

Memory
512 MB minimum

Network Interface Card
TCP/IP protocol
SVGA display
Mouse (or other Windows®-compatible pointing device)
Microsoft Internet Explorer version 5 or higher

Operating System
Microsoft Windows NT 4 Service Pack 6a
Microsoft Windows 2000 SP2
Microsoft Windows XP Professional

Microsoft Windows Server 2003 Standard Edition

Web Server
Nortel Reporting for Contact Center has been verified with Microsoft Internet Information Services 4, 5, and 6.

Nortel Reporting for Contact Center is supported on a single PC only and is not intended to run on Cluster Servers like those supported by Windows 2003 Enterprise.

Hard Disk Space Required
For installation of application on Web Server: 109 MB
Storage space required for Historical Data: 4 GB minimum

Note that the database will grow through time and, if the diagnostic logging option is turned on, the log files will require extra disk space.

Operating System Compatibility

Nortel Reporting for Contact Center is verified for correct operation on the following operating systems:

Operating System	Version
Windows NT	4.00.1381
Windows 2000	5.00.2195
Windows XP Professional	Version 2002
Windows Server 2003	Standard Edition

The minimum recommended requirements for the PC designated as the Nortel Reporting for Contact Center Web Host PC for BCM50 2.0 with the CCRS installed on the Web Host PC are as follows:

Recommended Minimum PC Specification for BCM50 2.0 with CCRS Installed

IBM™ Compatible PC

Microprocessor
Intel® Pentium™ IV (or equivalent) minimum

Microprocessor Speed
2.0 GHz minimum

Memory
512 MB minimum

Network Interface Card
TCP/IP protocol
SVGA display
Mouse (or other Windows®-compatible pointing device)
Microsoft Internet Explorer version 5 or higher

Operating System

Microsoft Windows 2000 Professional SP4
Microsoft Windows XP Professional SP2

Web Server
Nortel Reporting for Contact Center has been verified with Microsoft Internet Information Services 4, 5, and 6.

Nortel Reporting for Contact Center is supported on a single PC only and is not intended to run on Cluster Servers like those supported by Windows 2003 Enterprise.

Hard Disk Space Required
For the CCRS application on Web Server: 1 GB minimum
For installation of application on Web Server: 109 MB
Storage space required for Historical Data: 4 GB minimum

Note that the database will grow through time and, if the diagnostic logging option is turned on, the log files will require extra disk space.

Operating System Compatibility

Nortel Reporting for Contact Center is verified for correct operation on the following operating systems:

Operating System	Version
Windows 2000	Professional
Windows XP Professional	2002

The minimum recommended requirements for a PC that is not the Web Host PC for BCM50 2.0 with the CCRS installed are as follows:

Recommended Minimum PC Specification for BCM50 2.0 on a PC with only CCRS installed

IBM™ Compatible PC

Microprocessor
Intel® Pentium™ IV (or equivalent) minimum

Microprocessor Speed
1.5 GHz minimum

Memory
256 MB minimum

Network Interface Card
TCP/IP protocol
SVGA display
Mouse (or other Windows®-compatible pointing device)
Microsoft Internet Explorer version 5 or higher

Operating System
Microsoft Windows 2000 Professional SP4
Microsoft Windows XP Professional SP2

Web Server
Nortel Reporting for Contact Center has been verified with Microsoft Internet Information Services 4, 5, and 6.

Nortel Reporting for Contact Center is supported on a single PC only and is not intended to run on Cluster Servers like those supported by Windows 2003 Enterprise.

Hard Disk Space Required
For the CCRS application: 1 GB minimum

Operating System Compatibility

Nortel Reporting for Contact Center is verified for correct operation on the following operating systems:

Operating System	Version
Windows 2000	Professional
Windows XP Professional	2002

Installation 3

Introduction

This chapter describes the installation prerequisites and the procedure for installing the Nortel Reporting for Contact Center software on the Windows Personal Computer that is designated as the Web Host PC. The Web Host PC communicates with the Nortel Contact Center. The Web Host PC also stores the Contact Center statistical database and the Nortel Reporting for Contact Center user interface, which is configured as a web site.

Users of other network PCs can use Internet Explorer to access the Nortel Reporting for Contact Center web site on the Web Host PC. From the web site, Users can access the software features and can obtain Real Time displays and Reports.

Upgrading to Reporting for Contact Center

This section describes the installation of Nortel Reporting for Contact Center from Nortel Networks Call Center Reporting on a Web Host PC.

If you are upgrading from Call Center Reporting 2.5, 3.0, or 3.5, refer to the *Upgrading from Call Center Reporting to Reporting for Contact Center* document.

If you are upgrading from a previous version of Nortel Reporting for Contact Center to a later version of Nortel Reporting for Contact Center, refer to the following section, Upgrading a Previous Version of Reporting for Contact Center.

Upgrading a Previous Version of Reporting for Contact Center

Follow these steps to perform an upgrade of a previous installation of Nortel Reporting for Contact Center.

1. On the Windows taskbar, select **Start** > **Settings** and then click **Control Panel**. The **Control Panel** window appears
2. Double-click the **Add or Remove Programs** icon.
3. From the list of programs select **Reporting for Contact Center**.
4. Click the **Change/Remove** button to start **InstallShield Wizard**.
5. The **InstallShield Wizard** window will open up. Select the **Remove** option and click the **Next** button.
6. Follow the on-screen instructions of **InstallShield Wizard** to complete the un-installation.
7. To install the latest version of Nortel Reporting for Contact Center, double-click on the Reporting for Contact Center .exe file.
8. **InstallShield Wizard** will open up. Follow the on-screen instructions to be guided through the installation process.

Note: You **DO NOT** need to uninstall MySQL Servers and Clients 4.1.14 or the Java 2 Runtime Environment SE v.1.5.0.

If required, the Nortel Reporting for Contact Center databases are modified during the installation. There is no loss of statistical data, but new data, tables, columns, and/or indexes may be added to them.

Deleting Temporary Internet Files

To prevent Internet Explorer from caching old versions of the Nortel Reporting for Contact Center web pages, delete the temporary Internet files on your computer. Follow these steps to delete temporary Internet files.

1. Click **Start**, then right-click the **Internet Explorer** icon, and select **Internet Properties**. See Figure 1: Internet Properties Dialog Box.

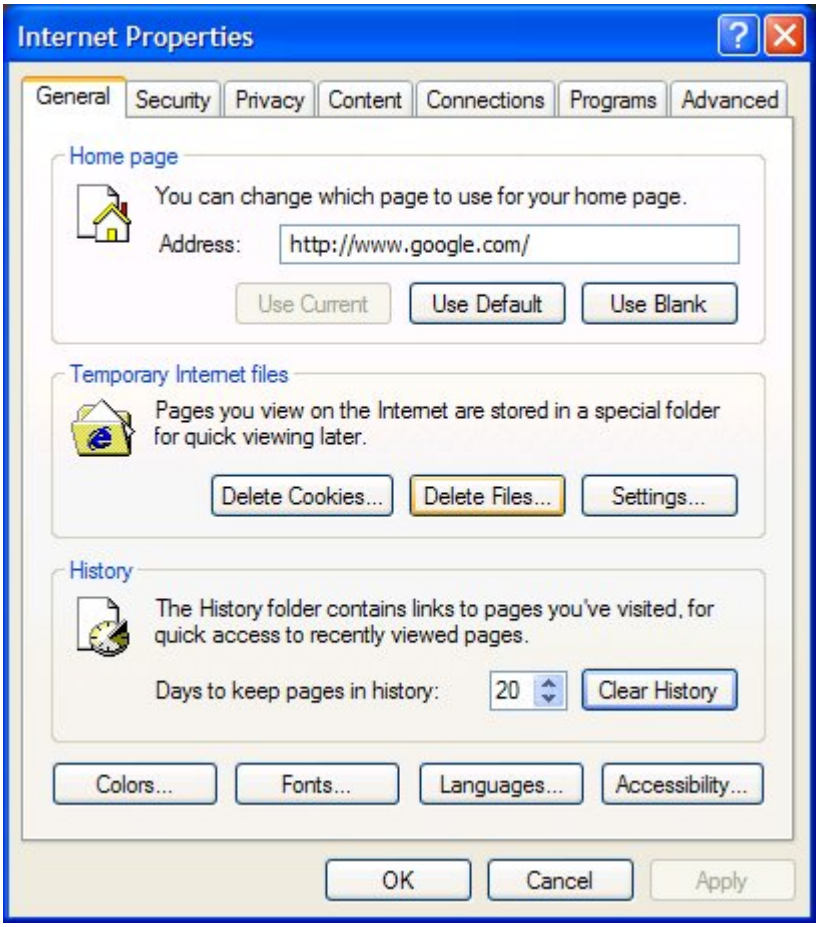


Figure 1: Internet Properties Dialog Box

Note: If you do not see the dialog box shown in Figure 1, you have clicked a shortcut to Internet Explorer. You **must** click the Internet Explorer icon in the Start menu.

2. When you see the window shown in Figure 1, click **Delete Files**. The **Delete Files** dialog shown in Figure 2: Delete Files Dialog appears.

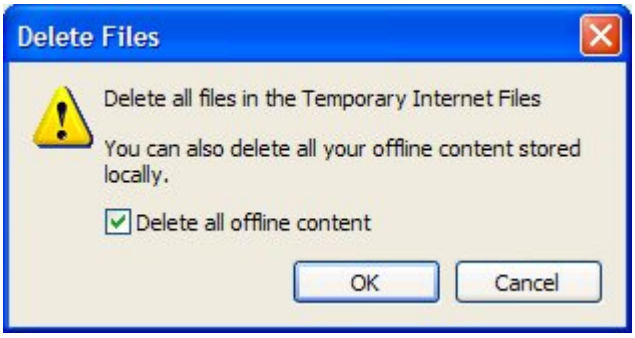


Figure 2: Delete Files Dialog

3. Select **Delete all offline content**, and then click **OK**.
4. Click **OK** to close the **Internet Properties** window.

Proceed with the installation of Nortel Reporting for Contact Center, as described in Installation prerequisites.

It may also be necessary to clear your Java Cache when upgrading RCC. This is not strictly necessary but should any problems be seen after the upgrade consult the *Reporting for Contact Center Troubleshooting and Maintenance Guide* (NN40020-402).

Installation prerequisites

Before you install Nortel Reporting for Contact Center software, you must:

- Be familiar with the Contact Center and the Windows™ operating system used by your Web Host PC.
- Ensure that the Contact Center is installed and configured.
- Ensure that the Contact Center platform is connected to, and is operational on, the network to which the Nortel Reporting for Contact Center Web Host PC is connected.
- Ensure that the full suite of Microsoft Internet Information Services is installed and operational on the Web Host PC, and that the Default Web Site is enabled. To install Microsoft Internet Information Services, refer to Installing Microsoft Internet Information Services.
- For the BCM50 2.0 platform, ensure that CCRS is downloaded from the Contact Center and installed and configured onto the Web Host PC, or any other PC on the network to which Nortel Reporting for Contact Center Web Host PC is connected to. To install CCRS, see Installing the CCRS for BCM50 2.0, on page 21.

Installing the CCRS for BCM50 2.0

If the Contact Center platform is a BCM50 2.0 system the User must install the CCRS separately onto a PC. CCRS should be installed before installing Reporting for Contact Center.

Check the following points prior to installing CCRS:

- If you run the CCRS and the RCC reporting client on the same PC, ensure that you configure them to use different ports. By default, RCC uses port 80 and the CCRS uses port 8088.

- Ensure you do not have a firewall blocking the following ports used for the CCRS:
  - Port 8088 – HTTP listening port
  - Port 2222 - Control port
  - Port 2223 - Real Time port
  - Port 2224 - Historical port

Perform the following steps to install the CCRS:

1. Exit any Windows programs that are running.
2. Start a browser session, and connect to the BCM50 Web page.
   The BCM50 Login dialog box appears.
3. Enter your username and password, and click **OK**.
   The Welcome to the BCM50 page appears, see Figure 3: BCM50 Welcome page.

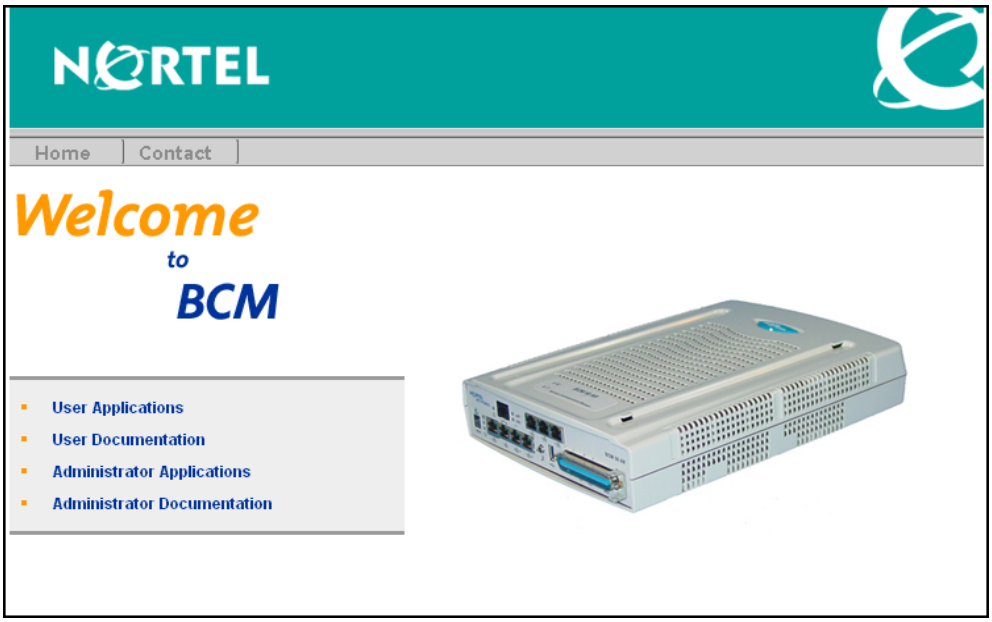


Figure 3: BCM50 Welcome page

4. Click the **Administrator Applications** link.
   The Administrator Applications page appears, see Figure 4: BCM50 Administrator Applications page.

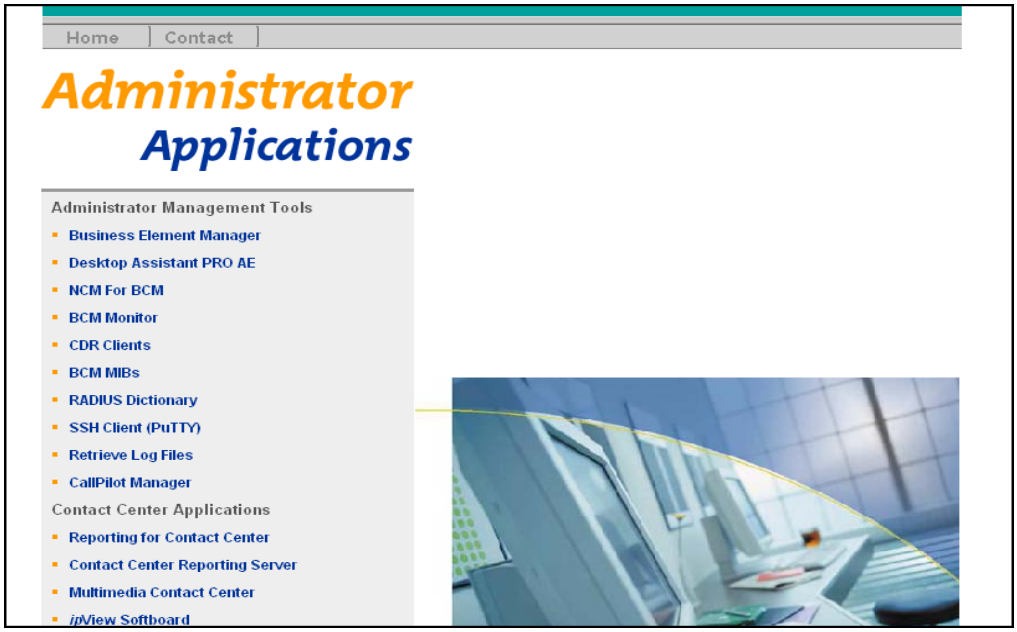


Figure 4: BCM50 Administrator Applications page

5. Click the **Contact Center Reporting Server** link.
   The Contact Center Reporting Server download page appears, see Figure 5: BCM50 Contact Center Reporting Server page.

Figure 5: BCM50 Contact Center Reporting Server page

6. Click the **Download Contact Center Reporting Server** link.
   A File Download dialog box appears.
7. Click **Save**, and save the application to the location from which you want to install it.

8. After the application downloads, double-click the application to launch the installation. The Welcome screen appears as shown in Figure 6: CCRS Installation Welcome screen.

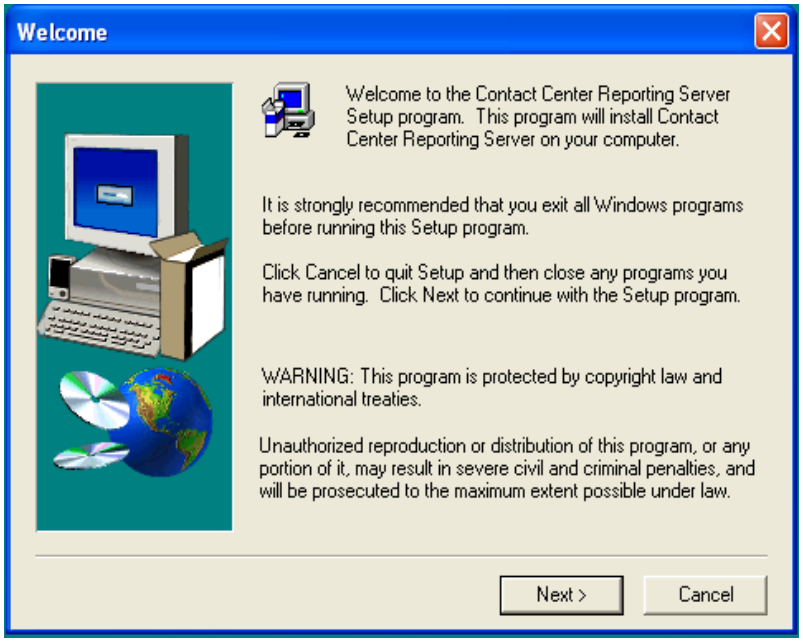


Figure 6: CCRS Installation Welcome screen

9. Click **Next.**
   The License Agreement appears.

10. Click **Yes** to accept the license agreement.
    The folder selection screen appears, see Figure 7: CCRS Installation destination folder screen. Nortel recommends you install the CCRS in the default folder.

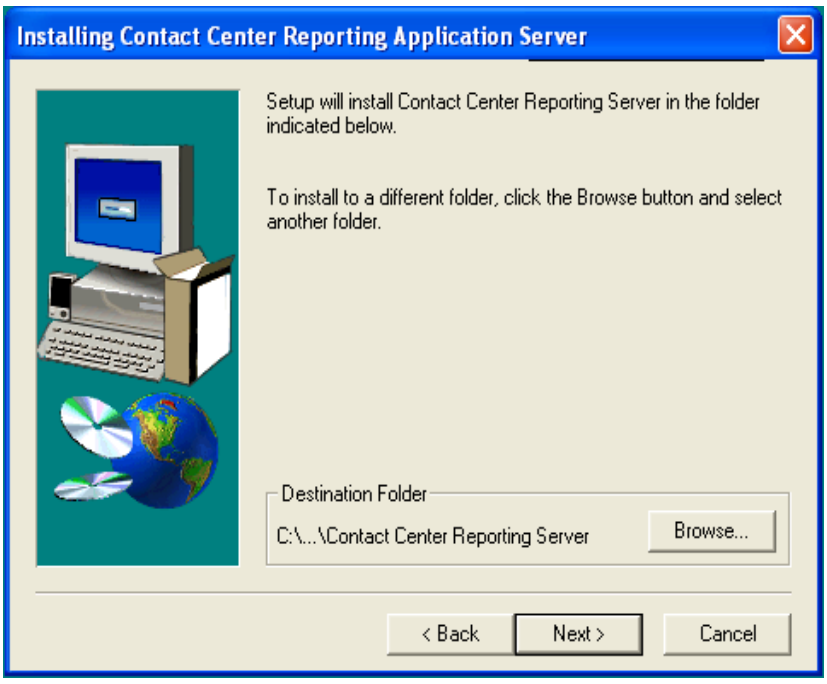


Figure 7: CCRS Installation destination folder screen

11. Click **Next**.
    The Installing Contact Center Reporting Database screen appears to select the database folder destination. See Figure 8: Installing Contact Center Reporting Database screen.

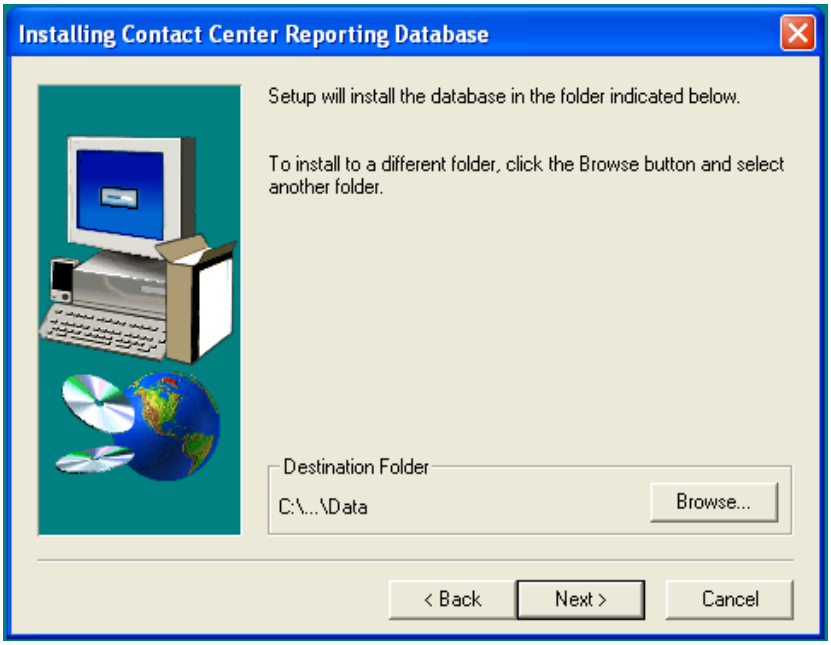


Figure 8: Installing Contact Center Reporting Database screen

Nortel recommends you install the database in the default folder shown.

12. Click **Next** to install the database.
    If you do not have the Microsoft SQL Desktop Engine (MSDE) installed on your computer, a message appears informing the user that MSDE will be installed. See Figure 9: MSDE installation message.

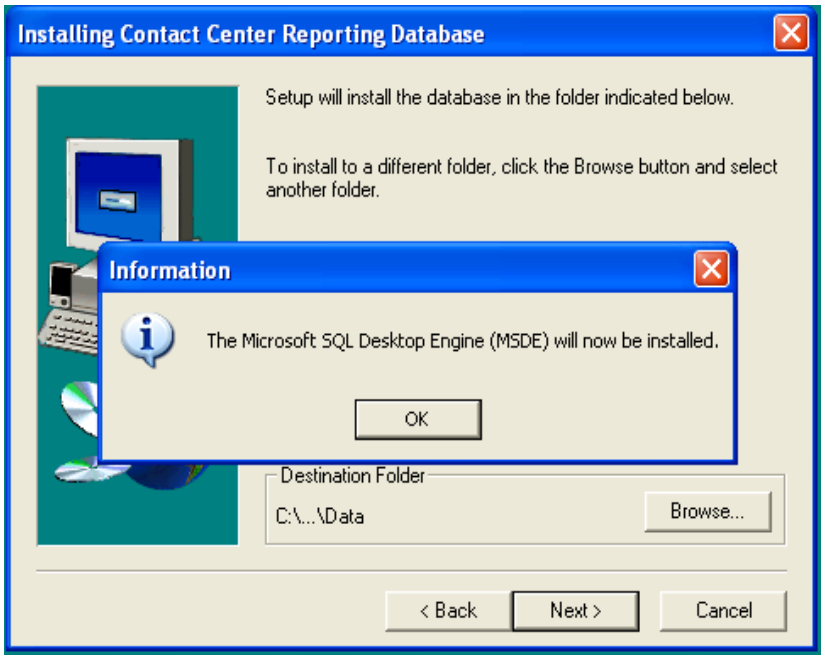


Figure 9: MSDE installation message

13. If you have MSDE installed, go to step 14.
    or
    If you do not have MSDE installed, click **OK** to install MSDE.
    Once MSDE is installed, a message will appear informing the user to restart their PC for the MSDE configuration changes to take effect.
14. If you do not have Microsoft .NET Framework installed, a message appears informing the user that Microsoft .NET Framework will be installed. See Figure 10: Microsoft .NET Framework installation message. Follow the information on the next six screens to install it.
    or
    If you have Microsoft .NET Framework, go to step 15.

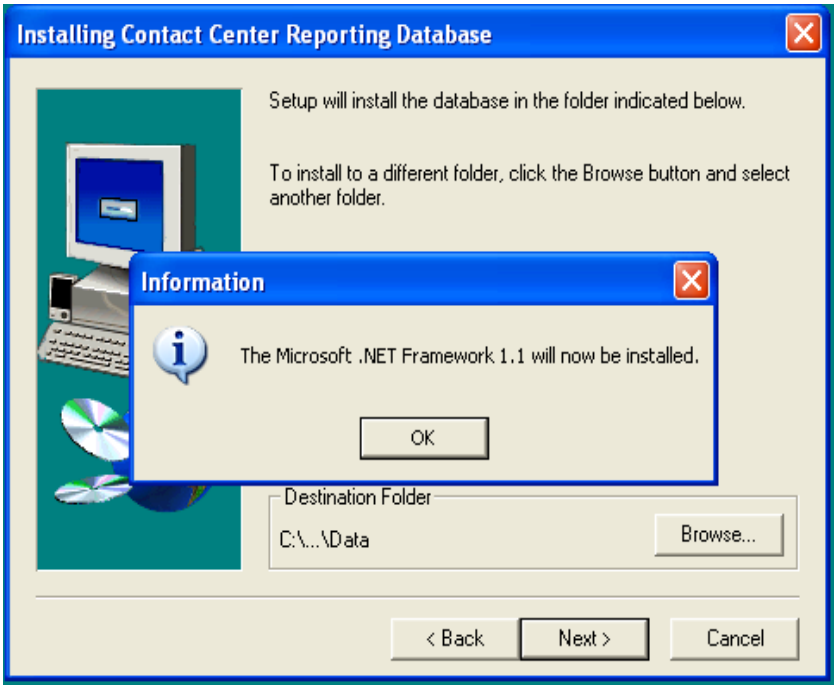


Figure 10: Microsoft .NET Framework installation message

15. A message appears that says the Contact Center Reporting Server configuration tool will now launch, see Figure 11: CCRS configuration tool launch message. Click **OK.**

Figure 11: CCRS configuration tool launch message

The Contact Center Reporting Server Config screen appears. See Figure 12: Contact Center Reporting Server Config screen.

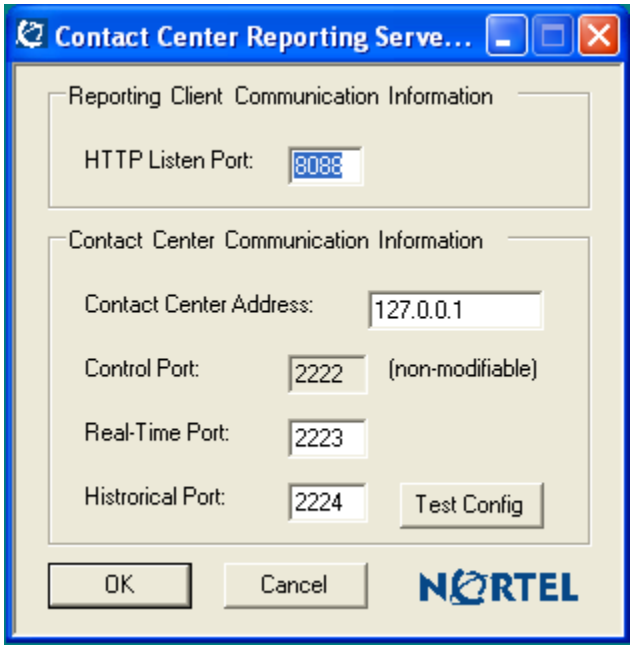


Figure 12: Contact Center Reporting Server Config screen

16. On the Contact Center Reporting Server Config screen:
    a. In the **Contact Center Address** box, your local host address automatically appears. Change the **Contact Center Address** to the IP address or the Fully Qualified Domain Name (FQDN) of your BCM50 2.0 system.
    b. The HTTP Listen Port default value is 8088. The Control Port default value is 2222. Nortel recommends you do not change the Listen Port value. The Control Port value cannot be modified. Nortel recommends you do not change the values for the Real-Time or Historical Ports.
    c. If you want to test your configuration settings, click **Test Config**.
    The **Test Complete** dialog box appears to show the test results. When the tests are complete, a **Success** message box appears. See Figure 13: Test Complete with results and Success message box.

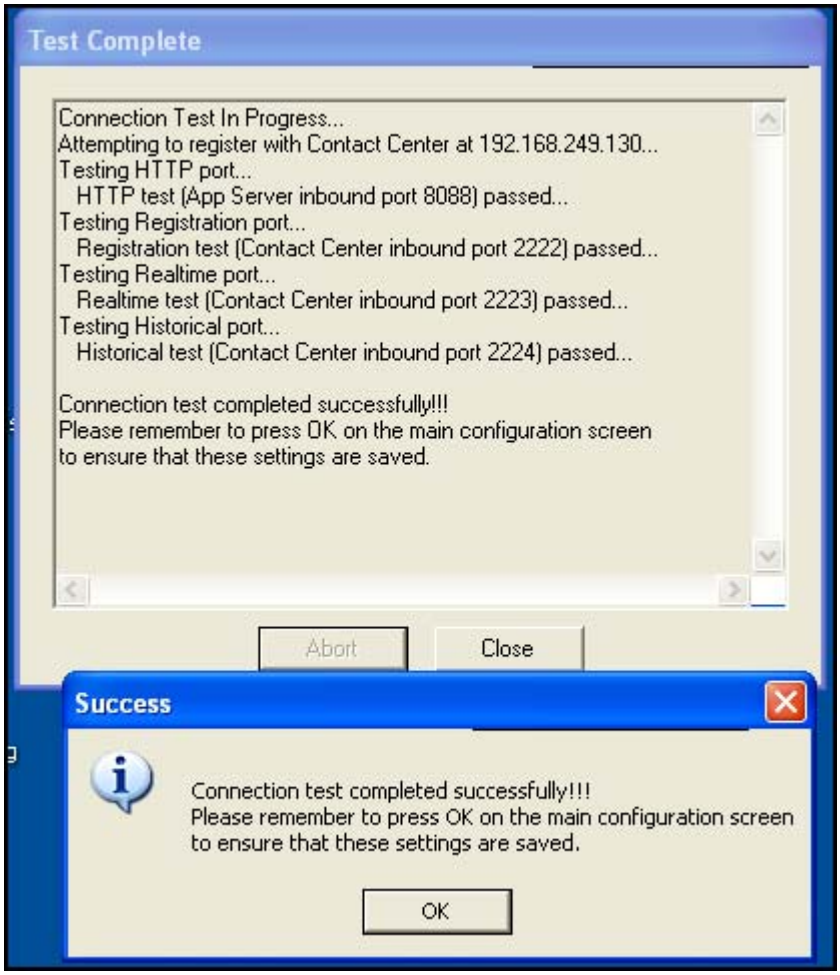


Figure 13: Test Complete with results and Success message box

d. In the **Success** message box, click **OK.**
e. In the **Test Complete** dialog box, click **Close**.
f. On the **Contact Center Reporting Server Config** screen, click **OK** to save your settings.
   The Setup Complete screen appears.

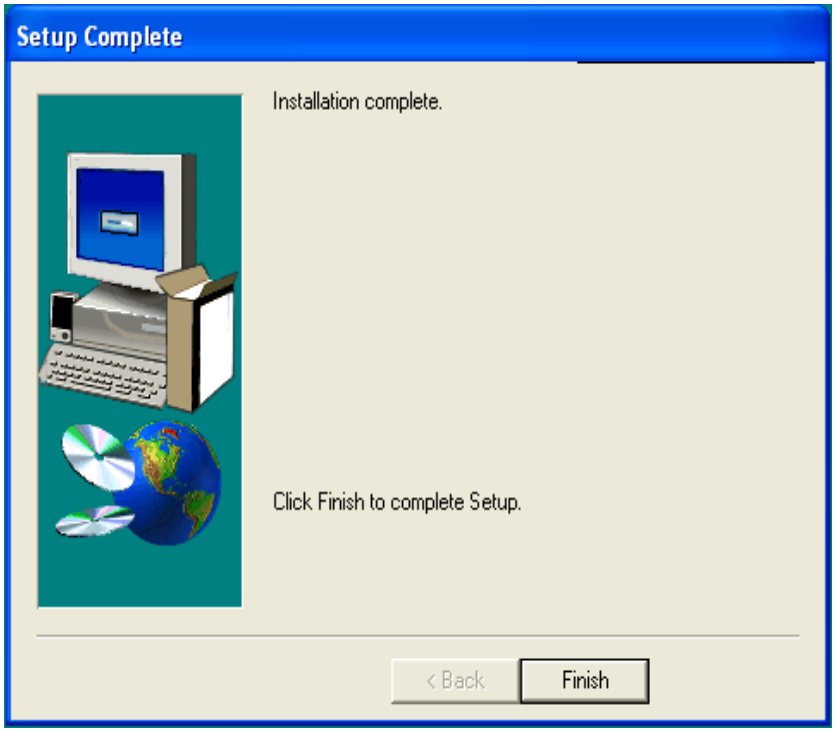


Figure 14: CCRS Setup Complete screen

17. Click **Finish**.

Testing and changing the configuration of CCRS

Once the installation of CCRS is complete, the port settings of the CCRS can be changed or tested using the Contact Center Reporting Server Configuration Utility. Ensure that the Contact Center Reporting Server service is stopped. This is done automatically during installations and upgrades.

To launch the configuration utility perform the following steps:

1. Click on the **Start** menu then click **All Programs** > **Nortel > Contact Center Reporting Server Config**.
   The Contact Center Reporting Server Config screen will open. See Figure 12: Contact Center Reporting Server Config screen.
2. Amend the configuration of CCRS as necessary.
3. To test the new or old configuration of CCRS, click on **Test Config**.
4. Click **OK** to save your settings and close the Contact Center Reporting Server Config screen.

Reinstalling or updating the CCRS

To reinstall or update the CCRS, you are not required to uninstall your current CCRS. You can run the install package of the new CCRS and the install script will read your configuration files and prompt you to keep the existing database.

Installing Microsoft Internet Information Services

You can install Microsoft Internet Information Services through the Add or Remove Programs dialog box, using the Add/Remove Windows Components icon. See Figure 15: Add or Remove Programs.

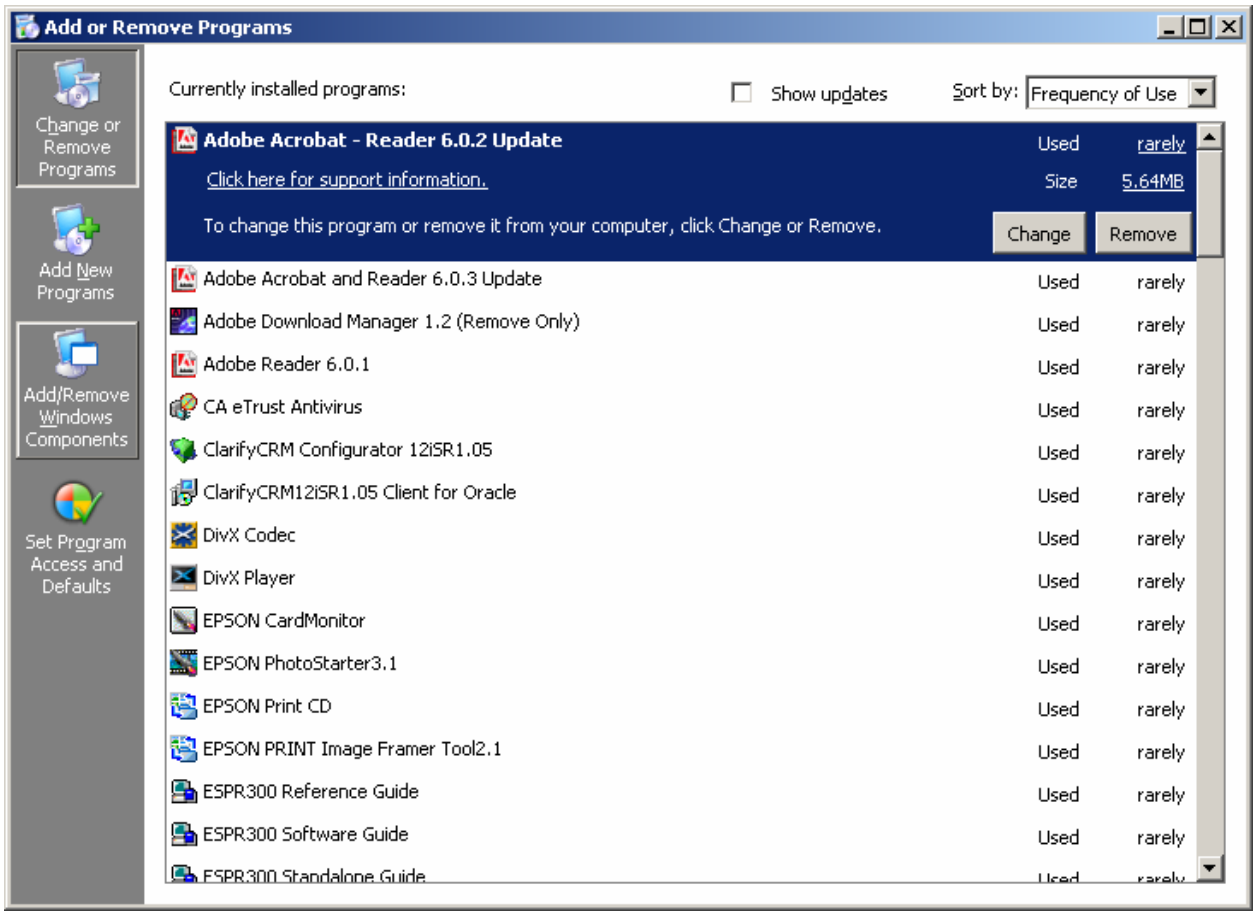


Figure 15: Add or Remove Programs

Follow these steps to install Microsoft Internet Information Services.

1. On the Windows taskbar, select **Start** > **Settings** and then click **Control Panel**. The **Control Panel** window appears
2. Double-click the **Add or Remove Programs** icon. The Add or Remove Programs dialog box appears.
3. Click **Add/Remove Windows Components**. The Windows Components Wizard appears, as shown in Figure 16: Windows Components Wizard.

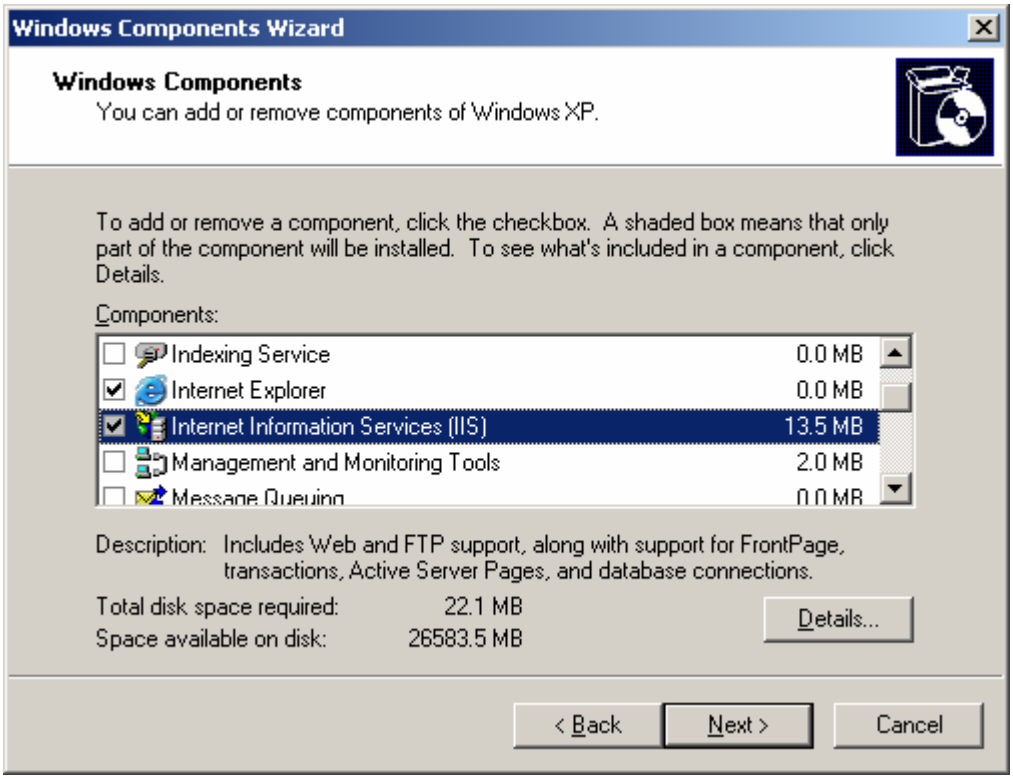


Figure 16: Windows Components Wizard

4. Select **Internet Information Services (IIS)**. The background of the check box turns grey, indicating that only the basic components of Internet Information Services will be installed. You do not need to install any additional components for Reporting for Contact Center to work properly. Installing additional components is optional, and additional components do not affect the operation of Reporting for Contact Center.

5. Click **Next**. The Configuring Components dialog box appears. See Figure 17: Windows Components Wizard Installation.

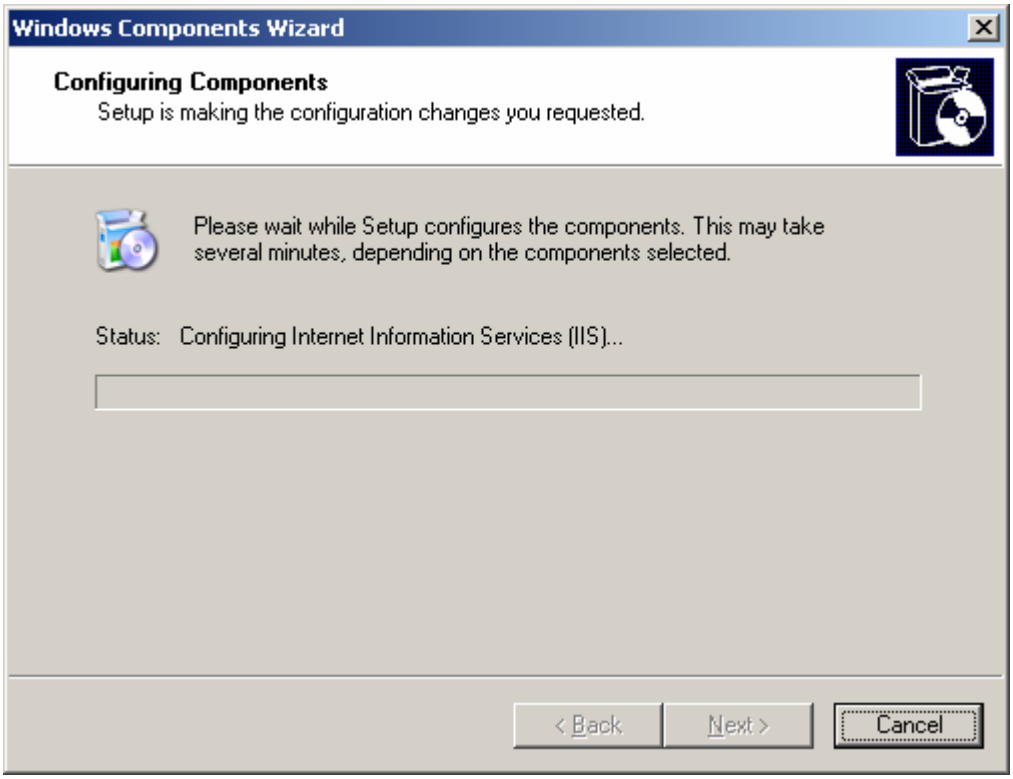


Figure 17: Windows Components Wizard Installation

Windows now installs your Internet Information Services component.

You may be prompted for additional installation files (typically from a CD). If you are prompted for additional files, insert the Windows operating system installation disk that was used to install the Windows operating system of the Web Host PC, and click **OK**. If you do not use the same disk, you cannot complete the installation.

6. When Internet Information Services installation is complete, you receive a message that confirms successful completion. See Figure 18: Windows Components Wizard Installation Completed.

Figure 18: Windows Components Wizard Installation Completed

Click **Finish** to return to the Add or Remove Programs dialog box. You can close the Add or Remove Programs dialog box and the Control Panel window.

7. To test that the Internet Information Service is properly installed, open Internet Explorer and point to http://localhost/

   If the installation is successful, a window similar to the window shown in Figure 19: Internet Information Services test page appears.

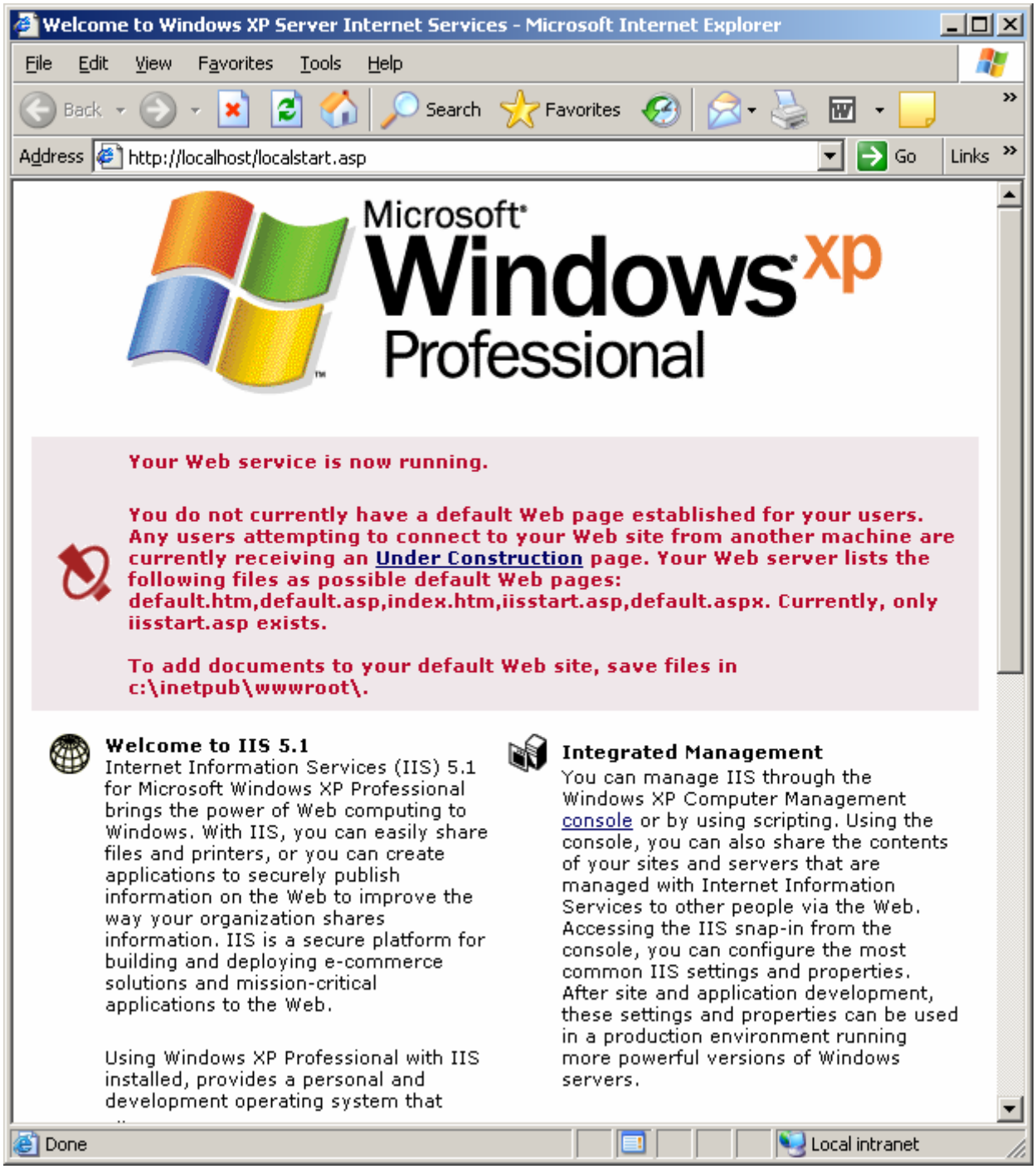


Figure 19: Internet Information Services test page

This window also contains useful information regarding your Internet Information Services. You can see the current version number and additional information about where to find extended help for Internet Information Services.

If you see a Page Cannot be Displayed screen, re-install the Internet Information Services and reboot the Web Host PC.

Note: On Windows NT you must upgrade Internet Information Services to Version 4. This version is available on the Windows NT Options pack CD.

To ensure correct operation of Nortel Reporting for Contact Center, observe the following points:

- The IP address setting for the default web site should be **All Unassigned**, or the IP address setting for the default web site should be 127.0.0.1 and the host header should be localhost.
- The port should be set to 80.
- Ports 3309, 3500, 6010, and 6011 must not be blocked by local firewalls.

Port Numbers used by Nortel Reporting for Contact Center

The list below gives all the port numbers used by Nortel Reporting for Contact Center on the Web Host PC:

- Port 80 – this is the standard port used by the Web Server (the Web Host PC) for Internet Information Services.
- Port 8088 – used for the Reporting Server in the Business Communications Manager.
- Port 3306 – used for MySQL Server 3.23.53 (this will be present if Reporting for Contact Center was installed as an upgrade to a previous version of Reporting for Call Center from BCM 3.6 or BCM 3.7).
- Port 3309 – used for MySQL Server 4.1.14.
- Port 3500 – used by *ip***View** SoftBoard to listen for incoming data and to echo to other wallboards.
- Port 6010 – used for the Reporting for Contact Center Real Time (RCCRT) Server.
- Port 6011 – used for the Reporting for Contact Center Reporting (RCCRPT) Server.

!	Nortel recommends that you ensure your Web Host PC Internet Information Services installation is as secure as possible. Generally, a secure installation involves loading security patches and/or service packs for Internet Information Services and for the operating system of the Web Host PC. These patches and service packs are available free of charge by Microsoft. Contact your network administrator for further advice.

You are now ready to install the Nortel Reporting for Contact Center software from the Contact Center platform. See Installing Nortel Reporting for Contact Center software.

Installing Nortel Reporting for Contact Center software

!	You **must** have Administrator rights for the installation to be successful. If you do not have Administrator rights for the PC on which you wish to install Nortel Reporting for Contact Center, the installation is halted and you are requested to log out and log back in with Administrator rights.

By default, Nortel Reporting for Contact Center software creates a folder in the location \Program Files\Nortel\Nortel Reporting for Contact Center on the installation drive of the Web Host PC. This folder contains the application files used by Nortel Reporting for Contact

Center. The folder also contains the Nortel Reporting for Contact Center configuration and statistical database.

> **Note:** Before Nortel Reporting for Contact Center will operate correctly, you must enable the Contact Center Reporting Software Keycode. For Software Keycode information, refer to the *Keycode Installation Guide* (NN40010-301).

TCP/IP Protocol

The Contact Center platform and Nortel Reporting for Contact Center use the industry standard TCP/IP protocol for communication between the Contact Center and the Nortel Reporting for Contact Center Web Host PC. The Windows Network component is required for the Nortel Reporting for Contact Center Web Host PC. Refer to Checking Installation of the Windows Networking Component.

The Nortel Reporting for Contact Center installation process does not install the Windows Network component. For instructions about installing the Windows Networking component, refer to your network or Windows documentation.

Checking Installation of the Windows Networking Component

Perform the following steps to check that the Windows Networking component is set up properly on the PC that will operate as the Web Host PC:

> **Note:** If your company has a network administrator, check with your administrator before changing any network configuration parameters.

1. Start the Windows system on the PC where the Nortel Reporting for Contact Center application is installed.

2. On the Windows taskbar, select **Start** > **Settings** and then click **Control Panel**. The Control Panel window appears.

   If you are using the Windows 2000 operating system, double-click **Networking and Dial-up Connections**. The Networking and Dial-up Connections window appears.

   If you are using the Windows XP operating system, select **Start > Connect to** and then click **Show All Connections**. The Networking Connections window appears.

3. Double-click the **Network** icon. The Network window appears with the Configuration tab displayed.

   If you are using the Windows 2000 or Windows XP operating system, right-click the **Local Area Connection** icon and then click **Properties**.

4. Check that TCP/IP appears on the list of installed network components. If TCP/IP is not on the list, click **Add** to install this protocol using the Windows installation instructions, or refer to your network administrator.

Installing Nortel Reporting for Contact Center for a Business Communications Manager Installation

Perform the following steps to install Nortel Reporting for Contact Center for a Business Communications Manager installation:

1. Close any Windows programs that are open.

2. Start your Internet browser (such as Internet Explorer or Netscape) and connect to the Business Communications Manager. In the browser Address Bar, enter the IP Address of the Business Communications Manager in the following format: https://10.10.10.1/

   Remember to substitute the IP Address of *your* Business Communications Manager for the 10.10.10.1 shown in the example.

   Enter the username **nnadmin** and password in the BCM Login window. Consult your network administrator for the password, as this would have been changed from the default password of **PlsChgMe!** On first installation of Nortel Element Manager. The Welcome to BCM page appears.

3. Click **Administrator Applications**.
   The Administrator Applications page appears.

4. From the Contact Center Applications list, click **Nortel Reporting for Contact Center**.
   Information about the Nortel Reporting for Contact Center application appears. See Figure 20: Download the Reporting for Contact Center Software.

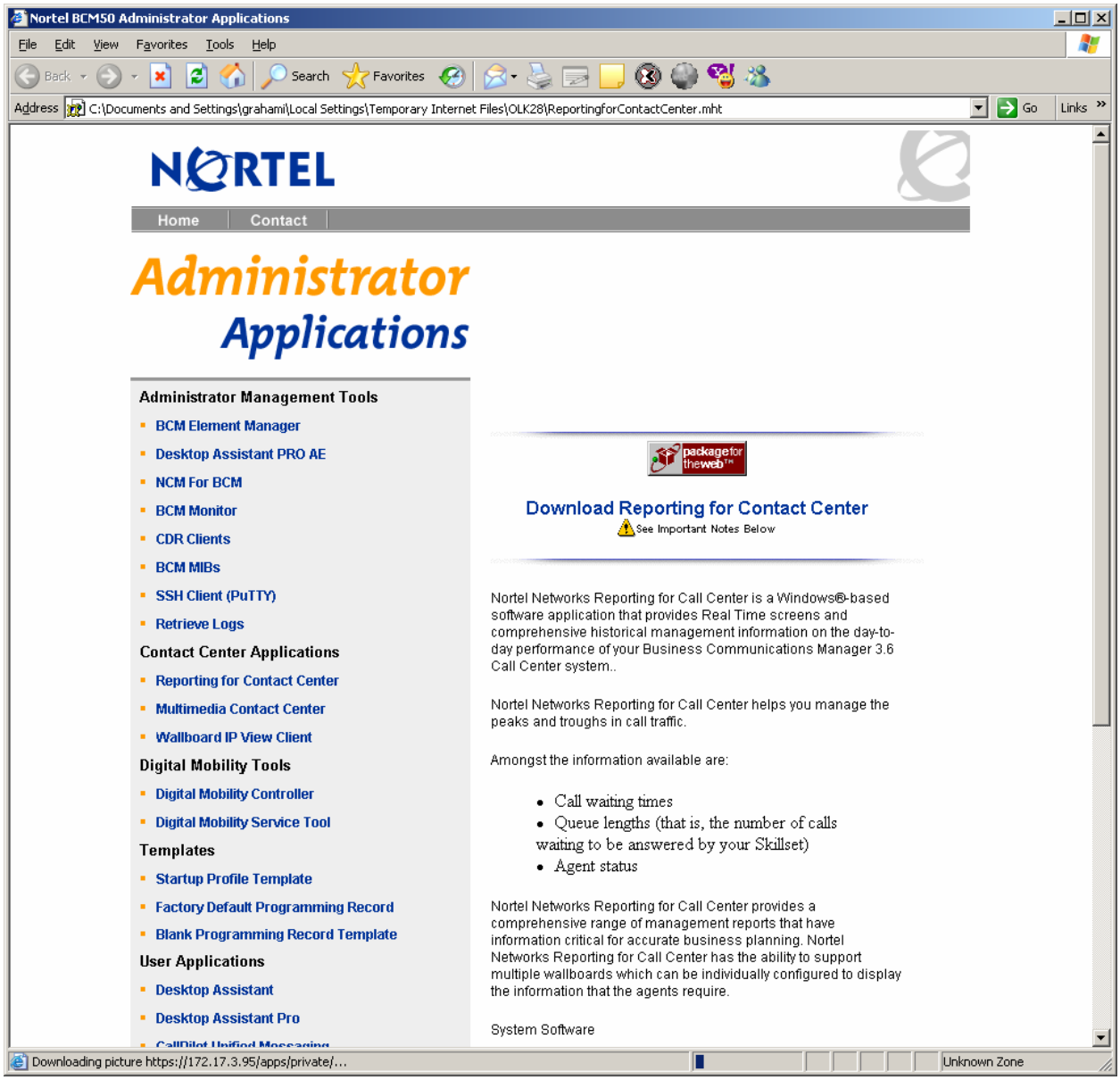


Figure 20: Download the Reporting for Contact Center Software

5. Click **Download Reporting for Contact Center** on the right side of the window. The **File Download** dialog box appears.

6. Select either **Run** to run this program from its current location, or **Save** to save this program to disk.

If you select **Save,** the Reporting for Contact Center executable file is downloaded to your PC, go to the location where you downloaded the file. Double-click the file to run it.

7. The Install Wizard shown in Figure 21: InstallShield Initialization Dialog appears. The wizard extracts the installation files required to install the Nortel Reporting for Contact Center files on the Web Host PC. Wait until the files are extracted.

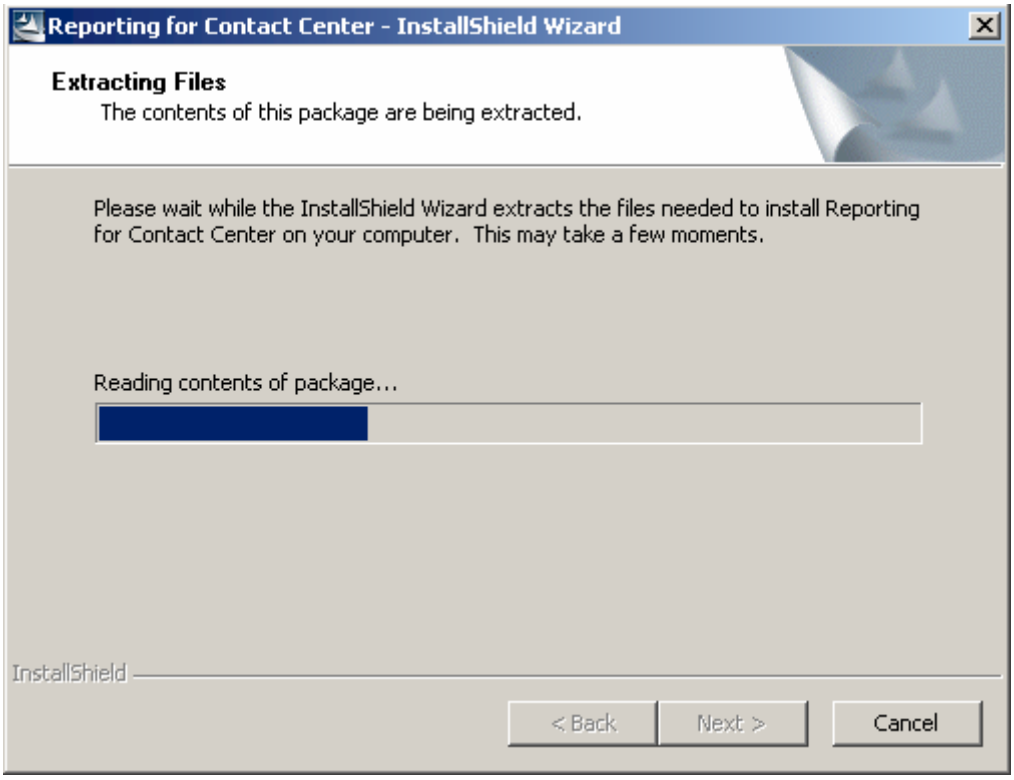


Figure 21: InstallShield Initialization Dialog

8. Once the files are extracted click the **Next** button.

9. The **Choose Setup Language** dialog box will be displayed, as shown in Figure 22: Language Selection Dialog, which allows you to select the default language for your installation of Nortel Reporting for Contact Center.

Figure 22: Language Selection Dialog

Note that each User of Nortel Reporting for Contact Center is assigned a language. You can have different languages in use by various Users at the same time.

This dialog box allows you to define the default language for the Login page and for the default Administrator. Click on the down arrow to the right of the dropdown box to display a list of languages. The languages to choose from are Danish, Dutch (Netherlands), English (United Kingdom), English (United States), French (Canada), French (France), German (Germany), Italian (Italy), Norwegian (Bokmal), Portuguese (Brazil), Spanish (Traditional Sort), and Swedish.

When you have selected your language, click **OK**. To stop the installation, click **Cancel**.

10. The InstallShield Windows Installer Configuration dialog box shown in Figure 23: InstallShield Windows Installer Configuration Dialog Box appears.

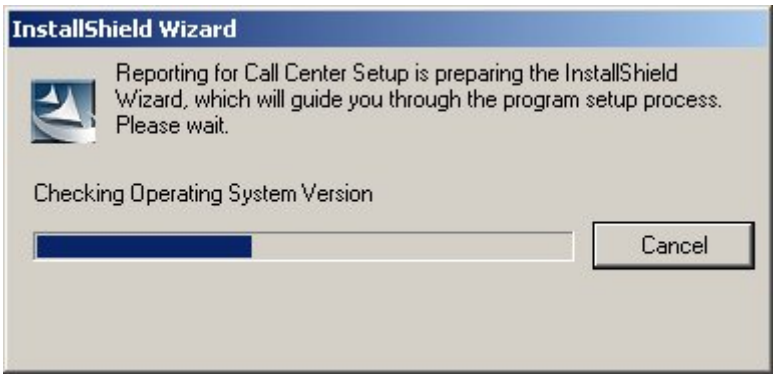


Figure 23: InstallShield Windows Installer Configuration Dialog Box

When prompted, click **OK**. The dialog box shown in Figure 24: InstallShield Wizard Start Dialog Box appears.

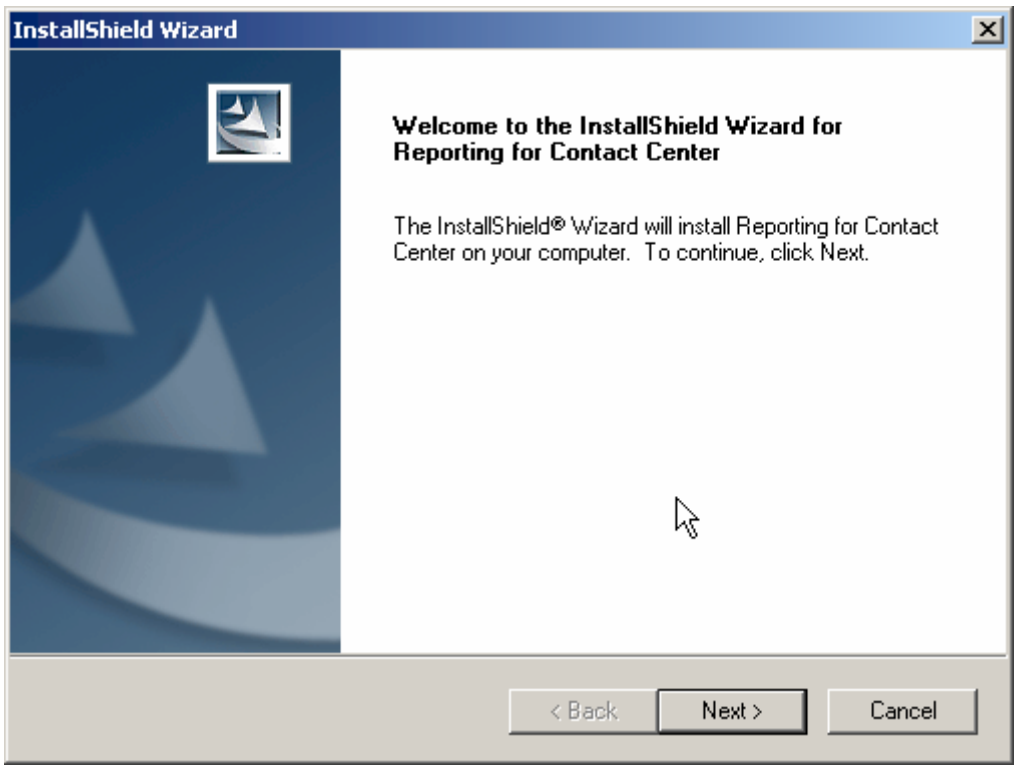


Figure 24: InstallShield Wizard Start Dialog Box

11. To proceed, click **Next**. The License Agreement dialog box shown in Figure 25: License Agreement Dialog Box appears.
    To cancel the installation procedure, click **Cancel**.

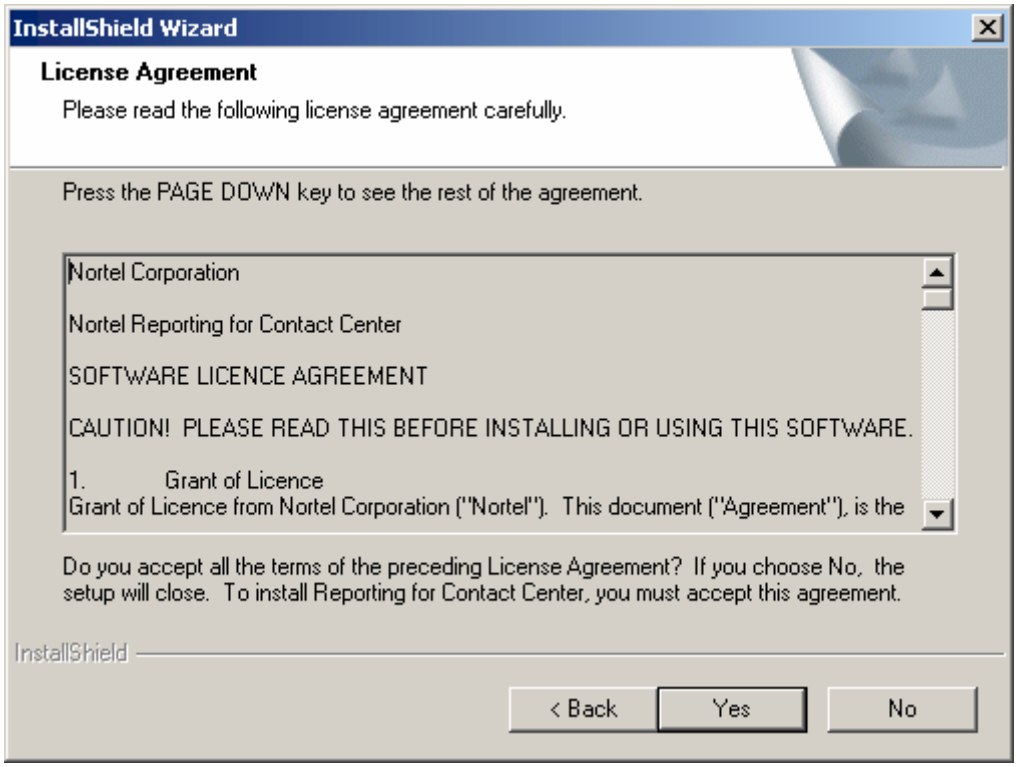


Figure 25: License Agreement Dialog Box

12. Read the Software License Agreement before proceeding. To proceed with the installation, click **Yes**. The Choose Destination Location dialog box shown in Figure 26: Choose Destination Location Dialog Box appears.
    To cancel the installation, click **No**. To return to the Welcome dialog box, click **Back**.

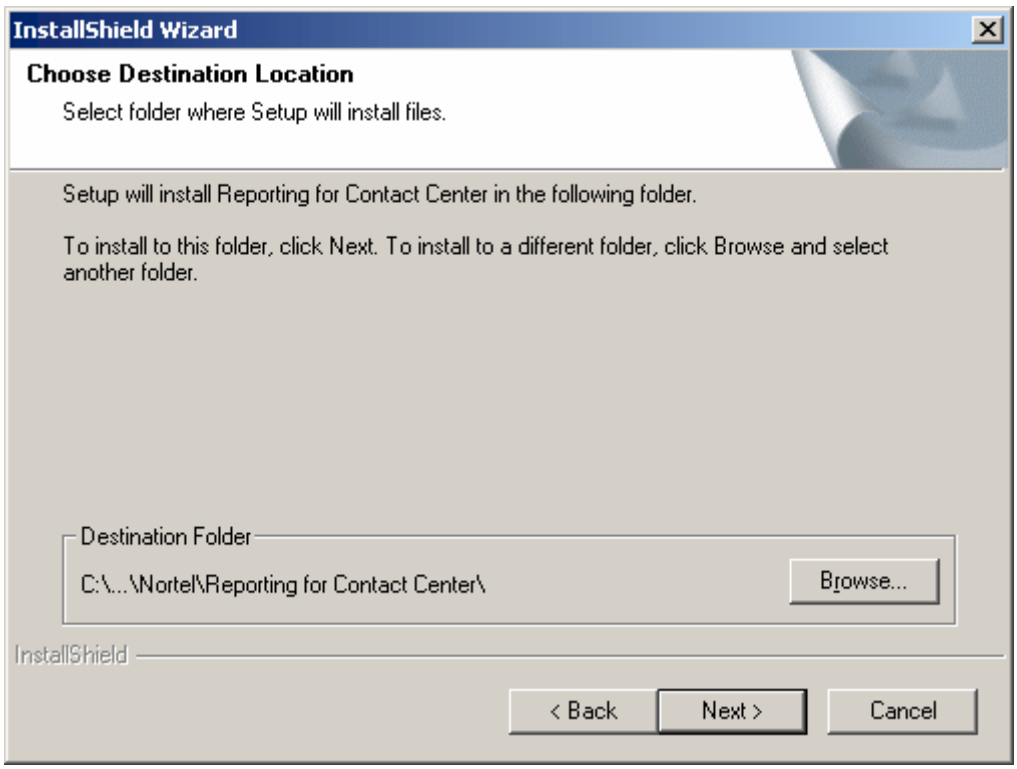


Figure 26: Choose Destination Location Dialog Box

13. Nortel recommends that you accept the location specified in the dialog box. If you do not wish to install Nortel Reporting for Contact Center on the default drive, C:, click **Browse** to choose a new location.

    To proceed with the installation, click **Next**. The Setup Status dialog box shown in Figure 27: Setup Status Dialog Box appears.

    To cancel the installation, click **Cancel**. To return to the Customer Information dialog box, click **Back**.

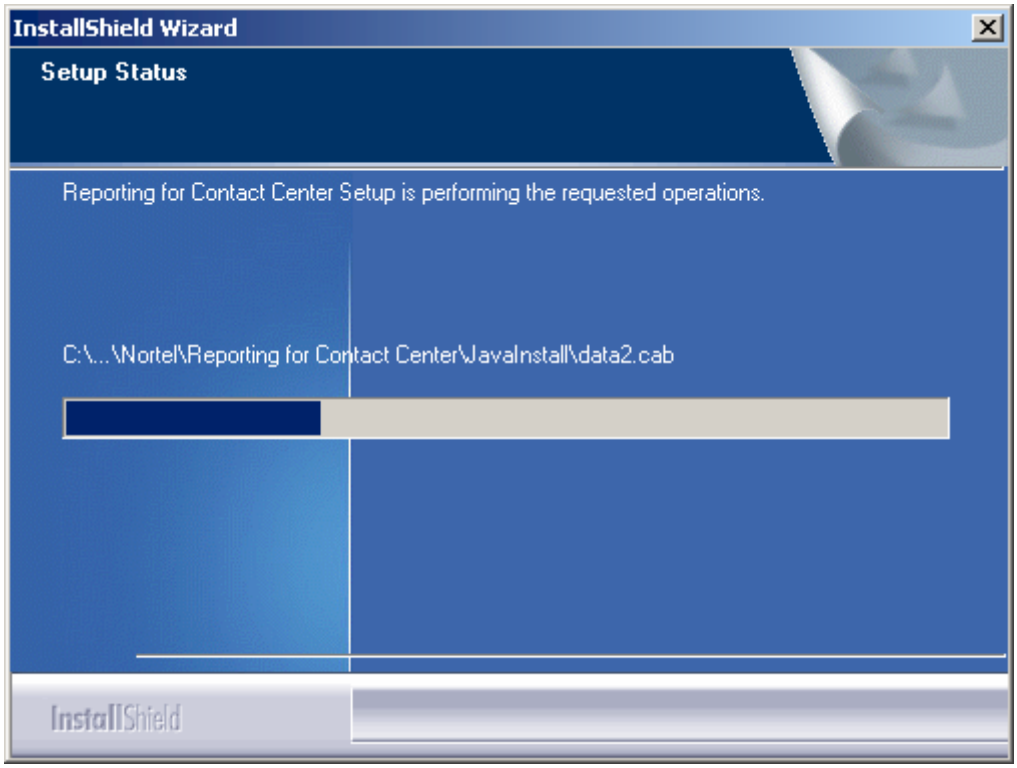


Figure 27: Setup Status Dialog Box

    The Setup Status dialog box shows the progress of the installation. To cancel the installation, click **Cancel.**

14. During installation, the message shown in Figure 28: ODBC Driver Installation Dialog appears. Wait for the installation to complete.

Figure 28: ODBC Driver Installation Dialog

15. If MySQL 3 is installed on the Web Host PC, the MySQL Port Setter dialog box is displayed the first time the user installs Reporting for Contact Center using the MySQL

4.1 Server, see Figure 29: MySQL 3 Port Setter Dialog. The port number to be used by MySQL 4 can be entered, or selected from the drop down list box, or left at the default port number of 3309.

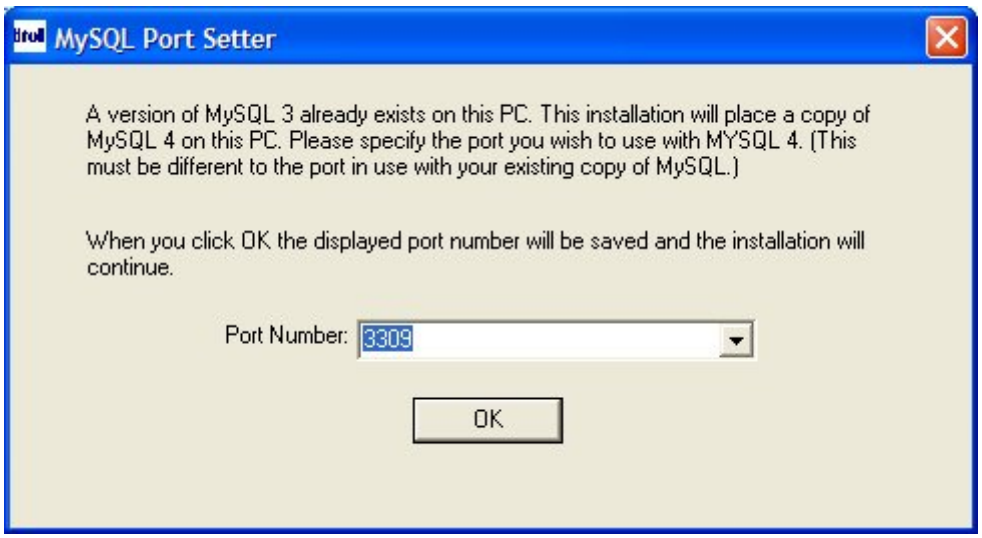


Figure 29: MySQL 3 Port Setter Dialog

On first installation of Reporting for Contact Center on a Web Host PC with MySQL 4 already installed, the MySQL Port Setter dialog box appears, as shown in Figure 30: MySQL 4 Port Setter Dialog. Select the port number to be used by the MySQL 4.1 Server from the drop down list box, or enter a new port number, otherwise the port number is set to the defaulted value of 3309.

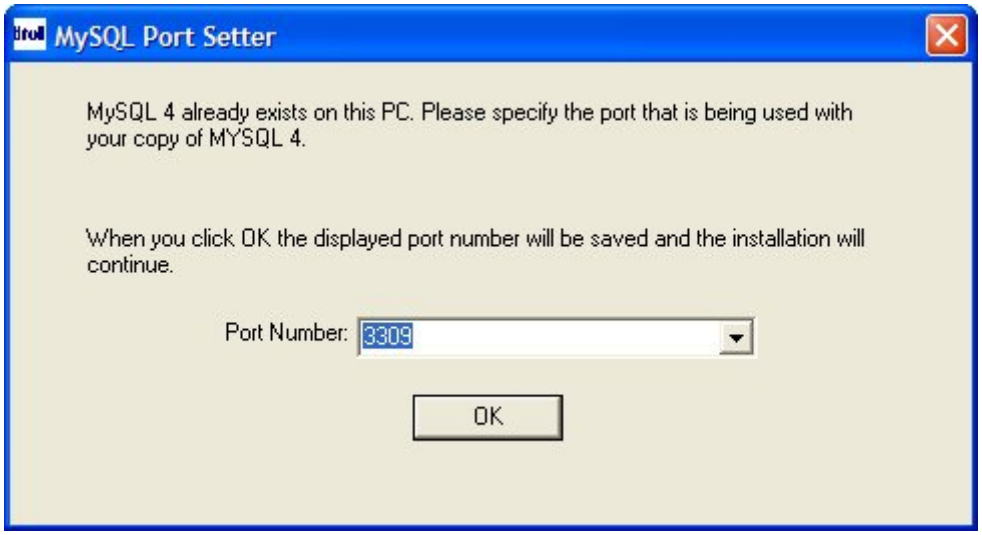


Figure 30: MySQL 4 Port Setter Dialog

16. Click **OK** to set the port number for MySQL 4.

17. The message shown in Figure 31: Database Installation Dialog appears. Wait for the installation to complete.

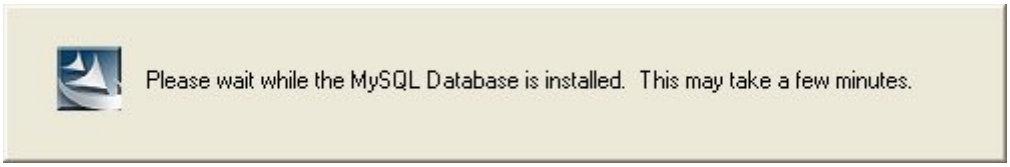


Figure 31: Database Installation Dialog

Note: The MySQL database is not installed in the same folders as Nortel Reporting for Contact Center; it is installed in \Program Files\MySQL\MySQL Server 4.1\data\mysql on the target hard drive.

18. The message shown in Figure 32: Java Installation Dialog appears. Wait for the installation to complete.

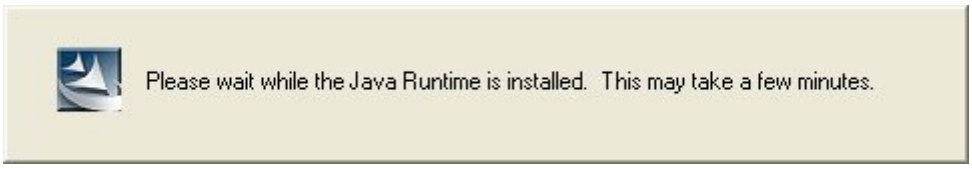


Figure 32: Java Installation Dialog

Note: The Java Runtime is not installed into the same folders as Nortel Reporting for Contact Center; it is installed into \Program Files\Java on the target hard drive.

19. When installation is complete, the Installation Complete dialog box shown in Figure 33: Installation Complete Dialog Box appears.

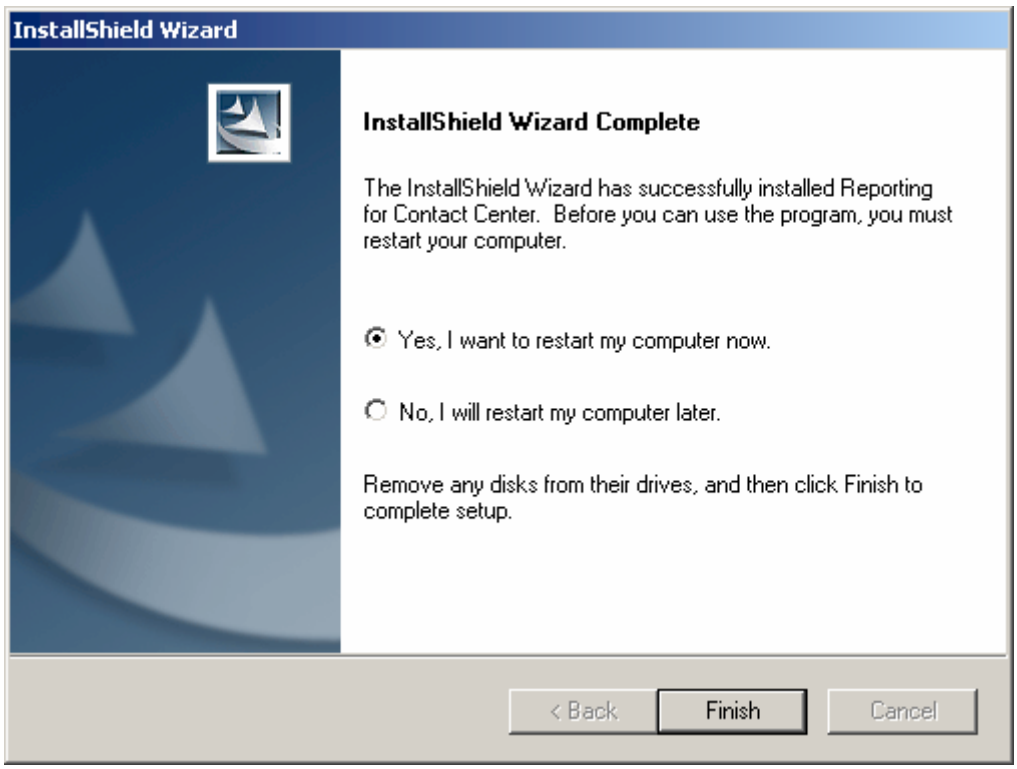


Figure 33: Installation Complete Dialog Box

Note: Before Nortel Reporting for Contact Center can operate correctly, you must restart your Web Host PC.

To have the installation restart the PC, click **Yes, I want to restart my computer now**, and then click **Finish**.

To complete the installation without restarting your PC at this time, click **No, I will restart my computer later**, and then click **Finish**.

Settings Required for Windows XP Service Pack 2

Perform the following steps to configure the settings on a Web Host PC that has Windows XP Service Pack 2 installed:

1. From the Windows task bar, select **Start > Control Panel >Security Center**. The window shown in Figure 34: Windows Security Center Window appears.

Figure 34: Windows Security Center Window

2. Click **Windows Firewall**. The Windows Firewall dialog box appears. See Figure 35: Windows Firewall Dialog Box.

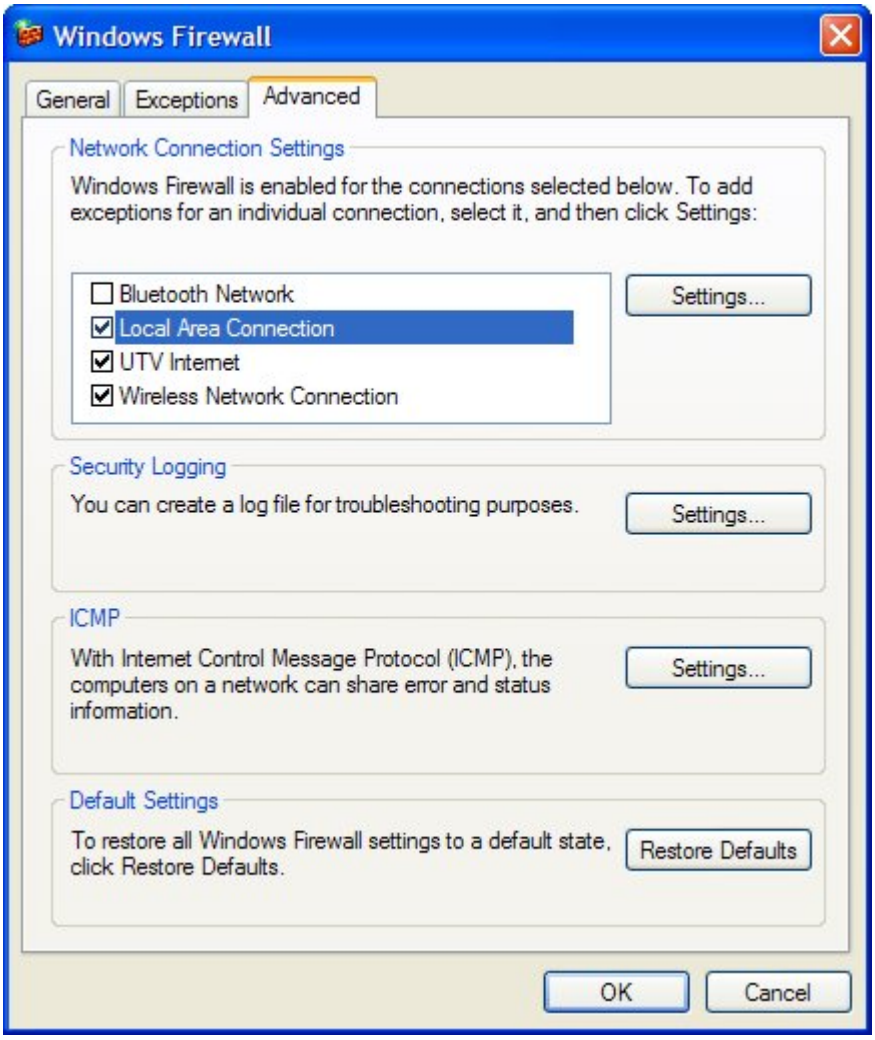


Figure 35: Windows Firewall Dialog Box

3. Select the **Advanced** tab and select **Local Area Connection**.
4. Click **Settings**. The Advanced Settings dialog box appears with the Services tab displayed. See Figure 36: Advanced Settings Dialog Box.

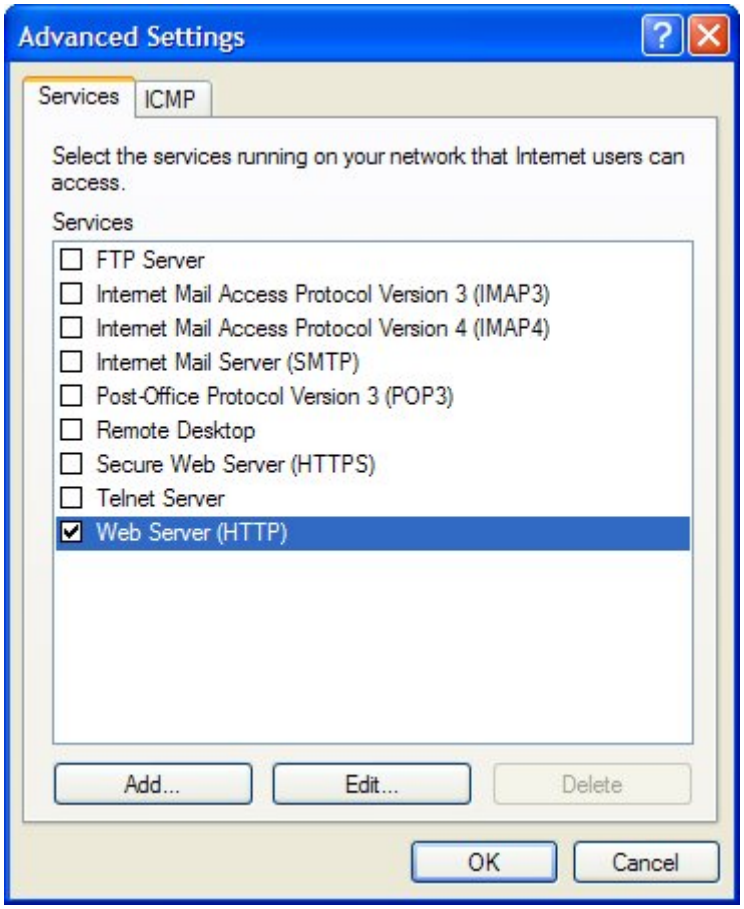


Figure 36: Advanced Settings Dialog Box

5. Select **Web Server (HTTP)** and click **OK.**
6. Click the **Exceptions** tab and click **Add**. The Add a Port dialog box appears. See Figure 37: Add a Port Dialog Box.

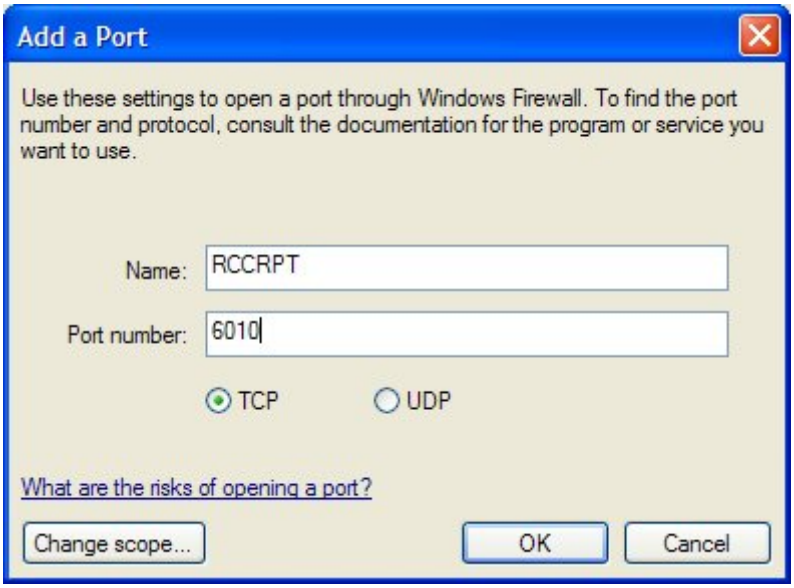


Figure 37: Add a Port Dialog Box

7. Enter RCCRPT as the name for the new port and enter 6011 for the port number. Leave the connection type as TCP, and click **OK**.
8. Repeat step 6 to add another new port. Enter RCCRT as the name for the new port and enter 6010 for the port number. Leave the connection type as TCP, and click **OK**.
9. Click **OK** to close the Windows Firewall dialog box, and then close the Security Center Window.

Settings Required for Windows 2003 Server, IIS 6

This section describes the changes that are required for Reporting for Contact Center to operate on Internet Information Services 6.

Change 1: Enable Active Server Pages

Perform the following steps to enable Active Server Pages:

1. Open IIS Manager.
2. Select **Web Service Extensions**. See Figure 38: IIS Main Window with Web Service Extensions Selected.

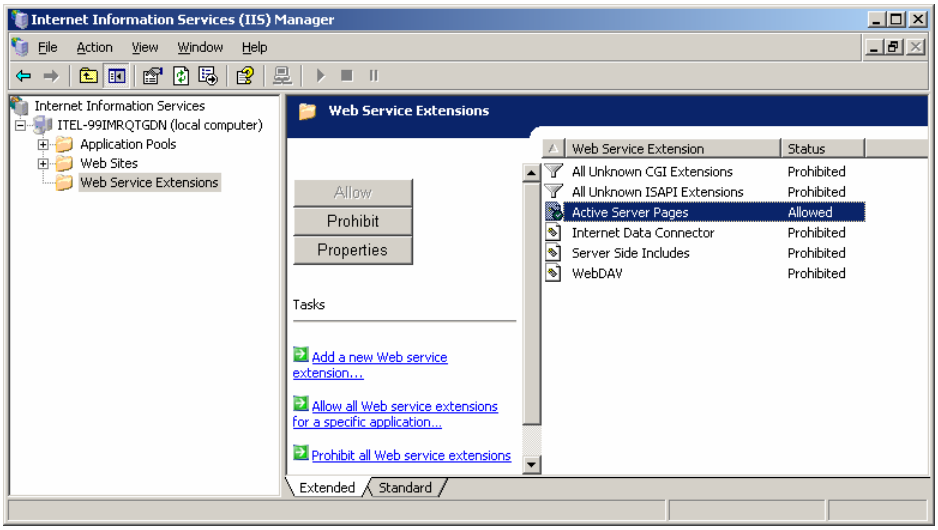


Figure 38: IIS Main Window with Web Service Extensions Selected

3. In the **Web Service Extension** list, select **Active Server Pages.**
4. Click **Allow**.

Change 2: Allow IIS 6 to see the Path to the RCC Folder

Perform the following steps to allow IIS 6 to see the path to the RCC folder:

1. Open IIS Manager.

2. Double-click **Web Sites.**
3. Double-click **Default Web Site**. See Figure 39: IIS Manager with the RCC Folder Selected.

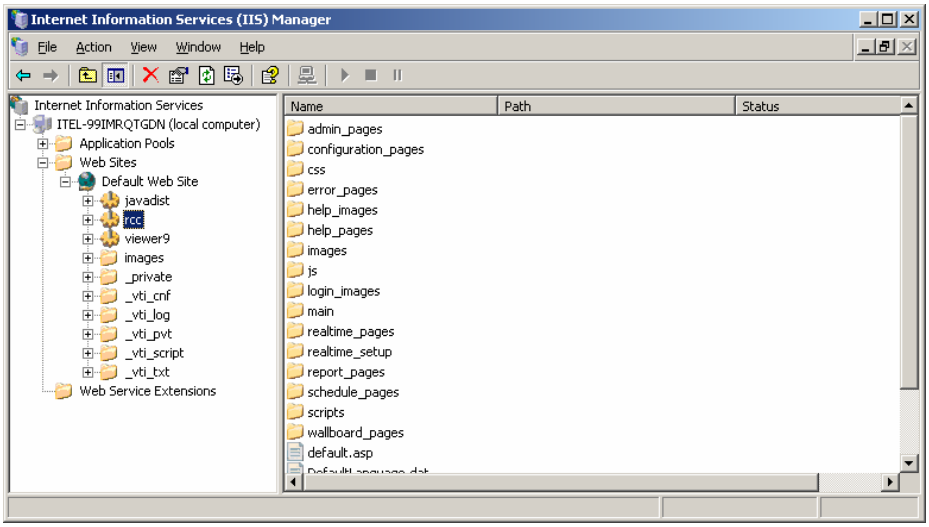


Figure 39: IIS Manager with the RCC Folder Selected

4. Right-click **RCC** and select **Properties.** The Properties dialog box appears. See Figure 40: RCC Properties Dialog Box**.**

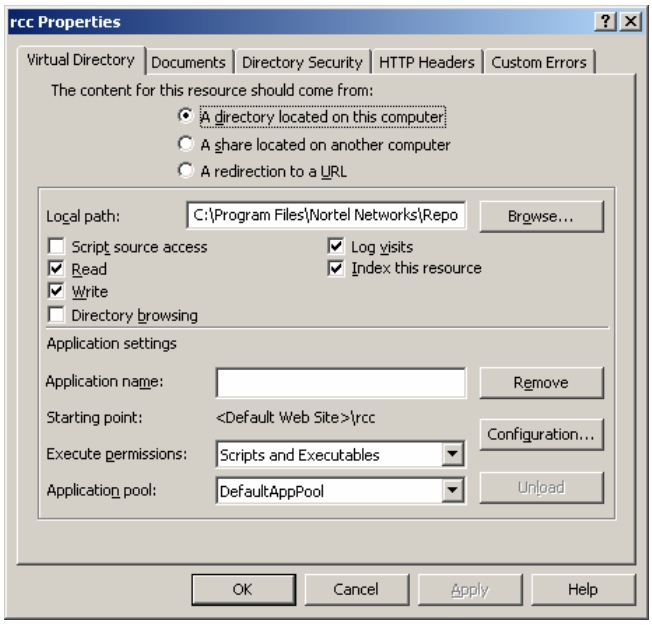


Figure 40: RCC Properties Dialog Box

2. Click **Configuration.** The Application Configuration dialog box appears. See Figure 41: Application Configuration Dialog Box**.**

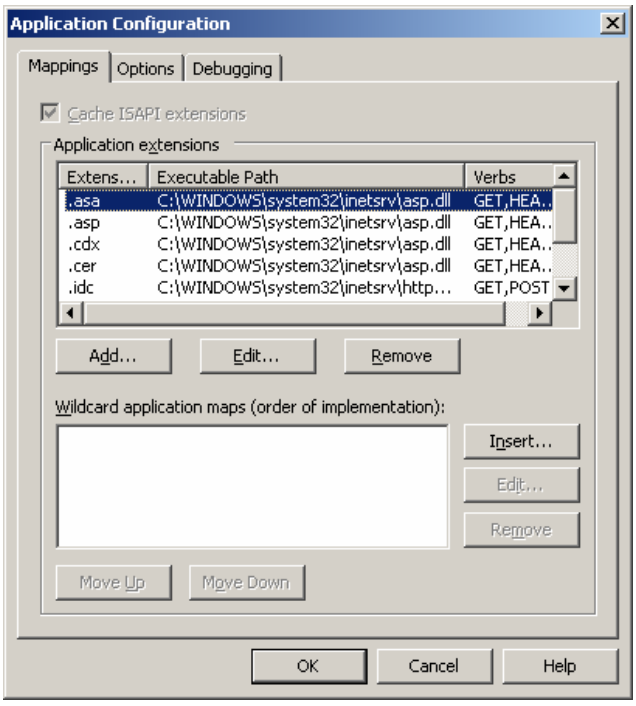


Figure 41: Application Configuration Dialog Box

3. Click the **Options** tab to view configuration options. See Figure 42: Options Tab

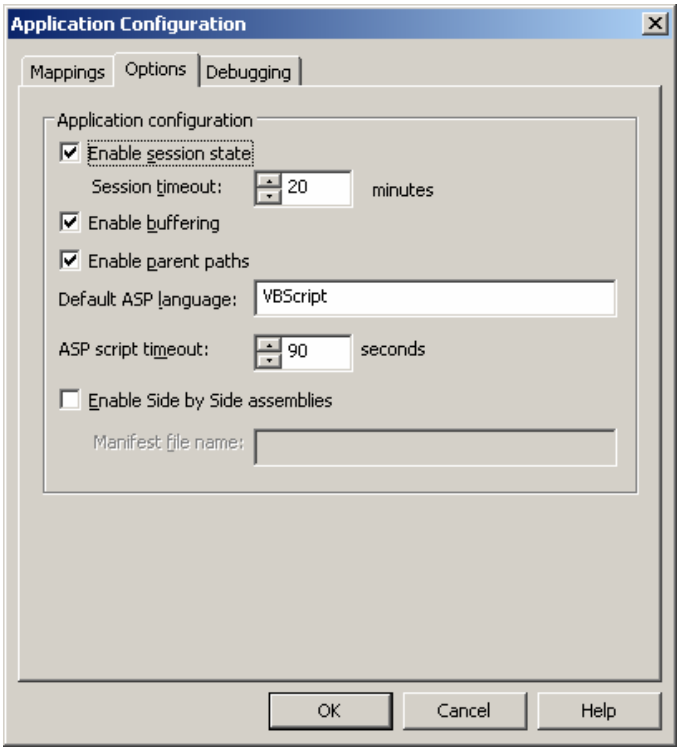


Figure 42: Options Tab

4. Ensure the **Enable parent paths** option is selected.

5. Click **OK**.
6. From the Properties dialog box, click **OK**.

Change 3: Create a new Application pool and add RCC to it

Perform the following steps to create a new application pool and to add RCC to the application pool:

1. Open the IIS Manager.
2. Right-click **Application Pools** and select **New** > **Application Pool.** The Add New Application Pool dialog box appears. See Figure 43: Add New Application Pool Dialog Box.
3. Enter **Nortel** in the **Application pool ID** field and select the **Use existing application pool as template** option.
4. In the **Application pool** name list, select **DefaultAppPool**.

Figure 43: Add New Application Pool Dialog Box

5. Click **OK.**
6. Right-click the newly created application pool **Nortel** and select **Properties.**
7. Click the **Identity** tab. The Identity tab appears. See Figure 44: Application Pool Identity Tab.
8. If the **Predefined** option is not selected, select it and select **Local System** in the list beside the Predefined option.

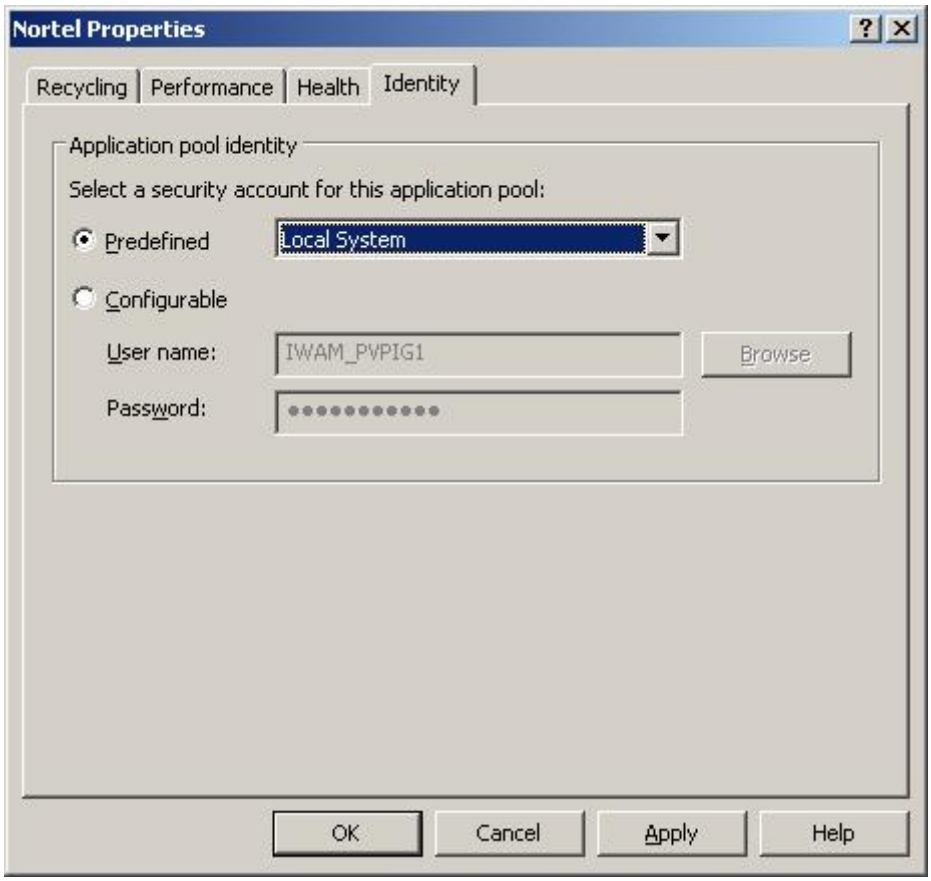


Figure 44: Application Pool Identity Tab

9. Click **OK,** and then click **Yes** in the confirmation dialog box that appears.
10. In the IIS Manager window, select **Web Sites** and double-click **Default Web Site**. See Figure 45: Selecting RCC.

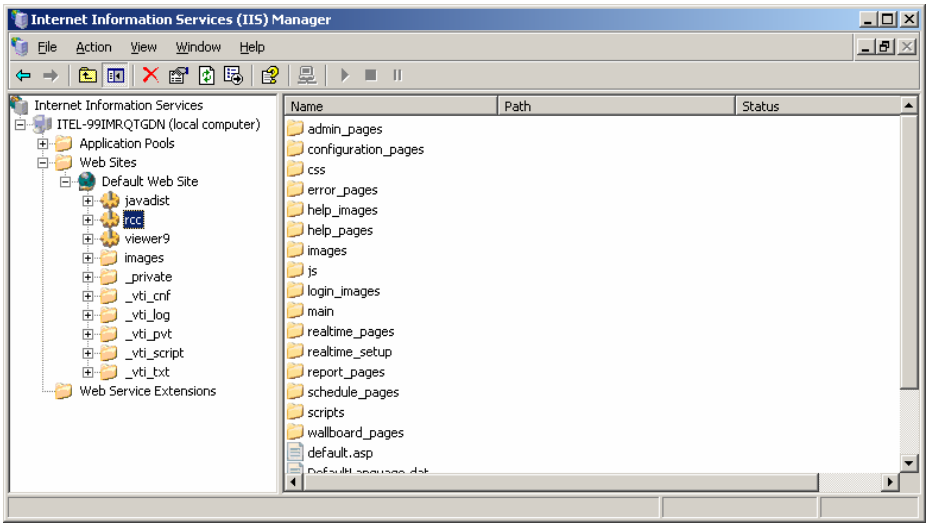


Figure 45: Selecting RCC

11. Right-click **RCC** and select **Properties**. The RCC Properties dialog box appears. See Figure 46: RCC Properties.

12. In the **Application pool** list, select **Nortel**.

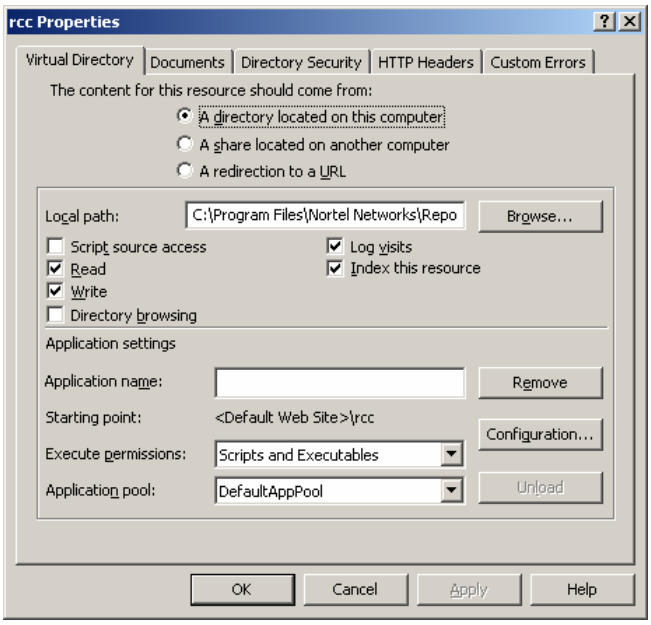


Figure 46: RCC Properties

13. Click **OK.**

Upgrading Reporting for Contact Center

Following an upgrade from one release of Reporting for Contact Center to another, you must repeat the steps in Change 2: Allow IIS 6 to see the Path to the RCC Folder. You do not need to repeat other changes in this section Settings Required for Windows 2003 Server, IIS 6.

Administration 4

This chapter describes the Nortel Reporting for Contact Center features for an Administrator user only. This includes connecting to the Contact Center as well as creating new Users and assigning Skillsets to them.

Logging In

Perform the following steps to log on to Nortel Reporting for Contact Center as an Administrator:

1. Using Internet Explorer, go to your Nortel Reporting for Contact Center Web pages Login page.

   The URL is http://*NameOfWebHostPC*/RCC

   Where *NameOfWebHostPC* is the network name or IP Address of the Web Host PC.

   The Login page appears. See Figure 47: Login page.

   Note: If you are using the browser on the Web Host PC, you can replace *NameOfWebHostPC* with **localhost**.

   Note: You can add the Login page to your Internet Favorites. To add this page to your favorites in Internet Explorer, press **Ctrl**+**D** when you are at the Login page, or click **Favorites, Add to favorites.**

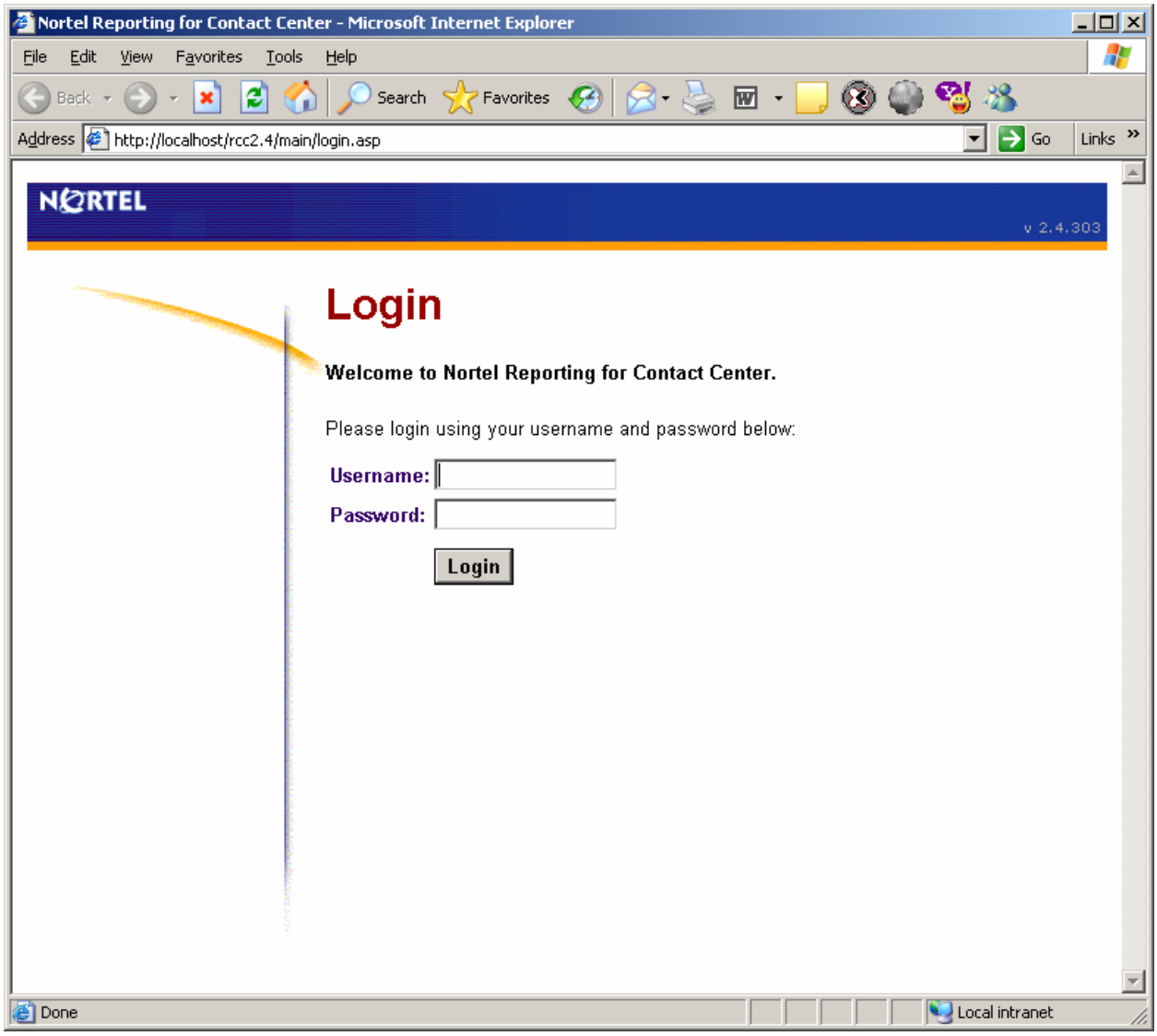


Figure 47: Login page

2. Enter the username **admin** and the default password **0000,** and click **Login**.

   You must change the default password the first time you log on. See Changing Default Password.

Changing Default Password

You must change the default password the first time you log on. Perform the following steps to change the default password:

1. When you first log on, the Change Password dialog box appears. See Figure 48: Change Password page.

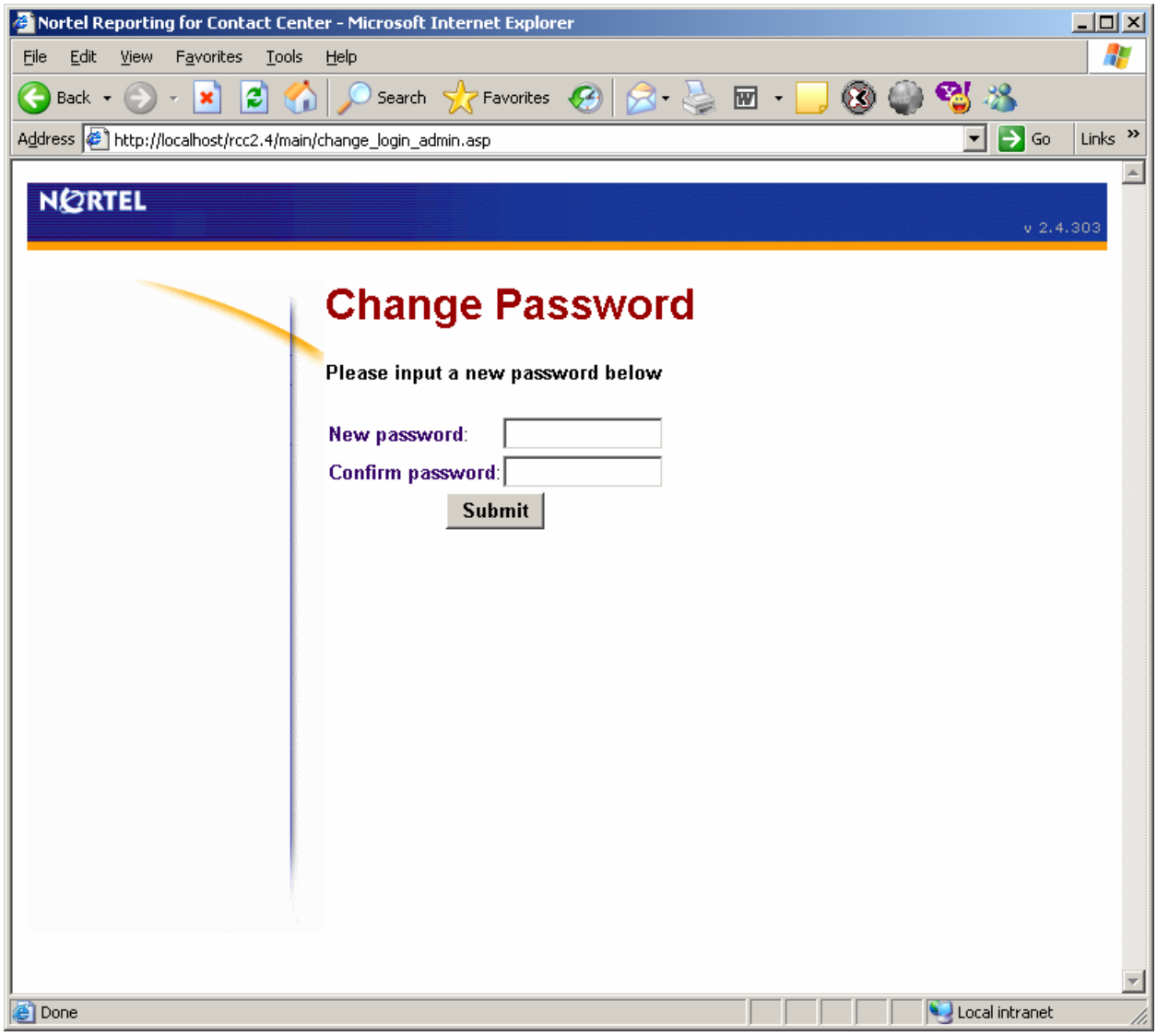


Figure 48: Change Password page

Your password can be from 1 to 10 characters, including upper and lowercase letters, and digits. The password can be anything other than 0000.

Enter your new password in the **New password** field.

2. Re-enter your password in the **Confirm password** field.

   If the passwords you entered are not the same, you are informed that the password and confirmation do not match, and you must re-enter the password in both fields.

3. Click **Submit**.

   If you successfully entered the new password, the Contact Center Connection page shown in Figure 49: Contact Center Connection page appears.

Contact Center Connection

The Contact Center Connection page allows you to specify the network identifier (IP address or Network name) of the Contact Center platform.

Typically, the Contact Center Connection page appears only once, after you first log on as an Administrator. If the Contact Center Connection information is incomplete or incorrect, the Contact Center Connection page appears each time you log on as an Administrator.

For example, if you add a new Network Card to the Web Host PC, you must select an IP address for the Web Host PC to communicate with the wallboards. In this case, the Contact Center Connection page appears so that you can select the IP address.

If you do not select the Contact Center Connection option from the menu, the page automatically appears after you log on, as shown in Figure 49: Contact Center Connection page.

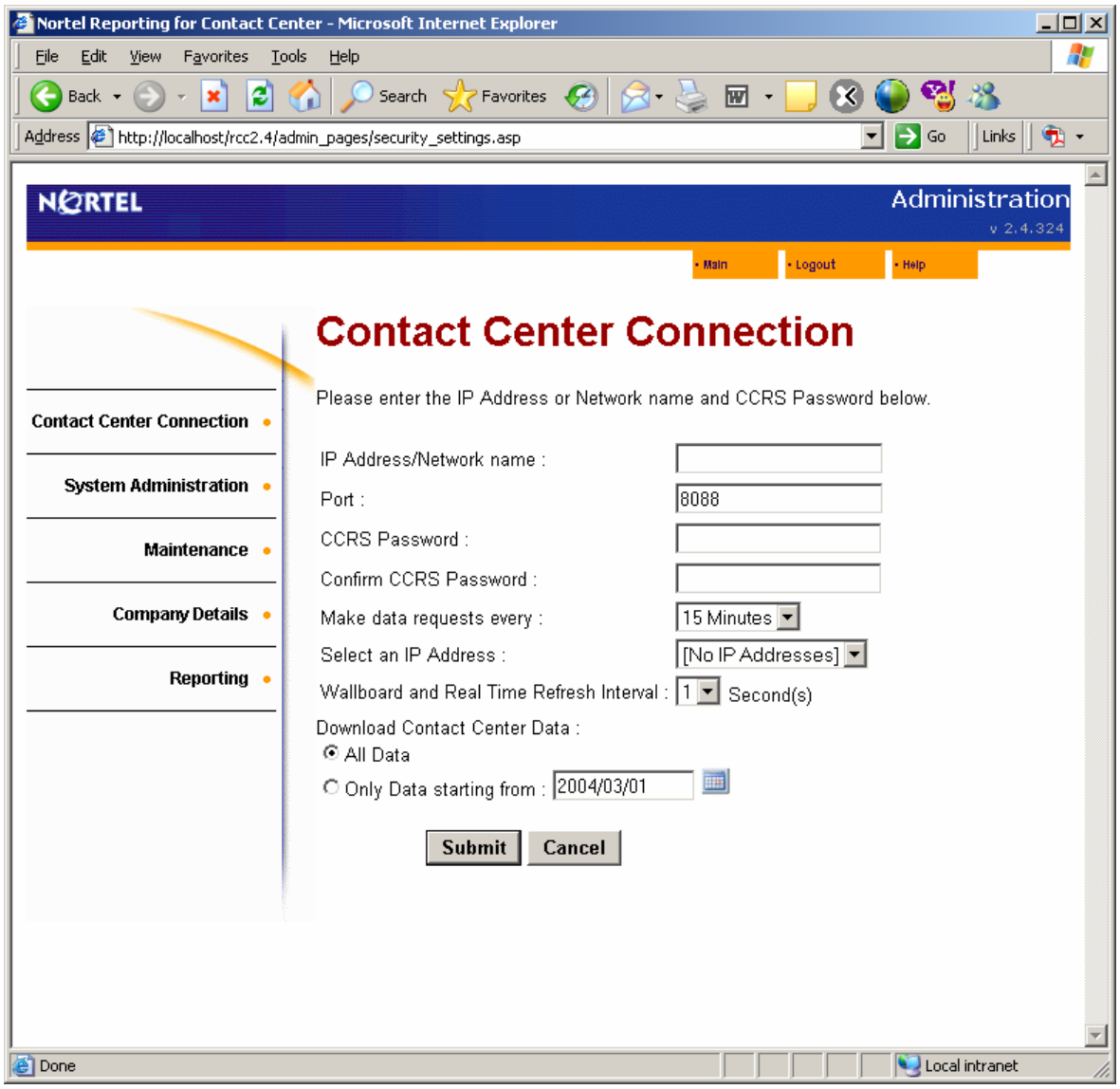


Figure 49: Contact Center Connection page

Perform the following steps to configure the Contact Center Connection page:

1. In the **IP Address/Network name** field, enter the IP Address or the Network name of the Contact Center platform. If you do not know what information to enter, consult the Local Area Network Administrator for your site.

!	Check that Reporting for Contact Center is configured to point at the IP Address of the Contact Center. For BCM 4.0 systems this will be the network IP address of the BCM. For BCM50 2.0 systems this will be the network IP address of the PC running the CCRS, not the BCM IP address.

2. The **Port** field will be defaulted automatically to the correct port number of 8088 for connection to a BCM 4.0 system.

   If the Contact Center is a BCM50 2.0 system the User must enter the port number as configured in the CCRS, by default this is 8088 but may have been changed during setup. CCRS is installed separately from BCM50 2.0 and the CCRS configuration tool launches as part of the CCRS installation where the User can change the port settings. The configuration tool can also be launched separately by clicking the **Start** menu then **All Programs** > **Nortel > Contact Center Reporting Server Config**.

!	If the User has upgraded from Nortel Networks Reporting for Call Center 2.1, or 2.2 to Nortel Reporting for Contact Center the **Port** field will be blank. Enter the correct port to re-establish connection.

3. When Nortel Reporting for Contact Center communicates with the Contact Center to request Real Time or Historical Report data, it includes a password in the data request. This allows the Contact Center to verify that the application requesting the data is authorized to receive it.

   This password is set within the Contact Center using CallPilot Manager. In the **CCRS password** field, enter the set password.

   Note: The default CCRS password is CCRS. If the default password is not accepted the password might have been changed in the Contact Center from within CallPilot Manager.

4. In the **Confirm CCRS password** field, re-enter the set password.

5. In the **Make data requests every** list specify how frequently the Web Host PC communicates with the Contact Center in order to obtain reporting data. The typical setting is 15 minutes.

6. In the **Select an IP Address** list, select the IP address (Network Interface Card) with which you wish to communicate with the wallboards. If the Web Host PC has more than one IP Address (because it has more than one Network Interface Card configured) the list is populated with the IP addresses configured for the Web Host PC. Select which

Network Interface Card to use for communication with the wallboards. The Network Interface Cards are identified in the list by their configured IP Addresses.

Select the IP Address that is configured on the Network Interface Card connected to the same network as the wallboards. Note that this IP Address is not the IP Address of the wallboard. This address is the IP Address configured for the Network Interface Card in the Web Host PC.

!	If you add a new Network Interface Card or other network device, such as a USB Bluetooth device, or if you enable a disabled Network Interface Card, then you must reboot your Web Host PC so that the new device is detected and presented in the **Select An IP Address** list.

7. From the **Wallboard and Refresh Real Time Interval** list, select your refresh interval for the Wallboard and Real Time displays. The two available options are 1 second (default) and 3 seconds.

!	This setting applies only to the refresh rate of the display. Wallboard and Real Time information is always calculated to the second. If, for example, you select 3 seconds as your refresh interval, your display updates every 3 seconds but your data is calculated to the second.

Figure 50: Download Contact Center Data options

8. On first installation of Reporting for Contact Center the **Download Contact Center Data** options are given, see Figure 50: Download Contact Center Data options. The User can select whether to download all data from the Contact Center by selecting **All Data**, or the User can select **Only Data starting from** and click on the calendar icon to the right to select a start date from when data should be downloaded from the Contact Center.
9. Click **Submit**. A download status field appears to display the progress of the Contact Center download. See Figure 51: Download Status Window.

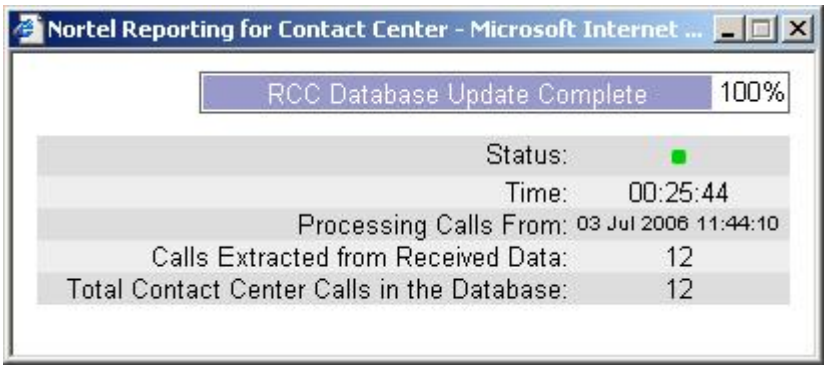


Figure 51: Download Status Window

The **RCC Database Update Complete** field indicates the percentage of download completion. When Reporting for Contact Center is installed, it queries the Contact Center for any Contact Center data that the Contact Center has accumulated.

A green **Status** field indicates the successful downloading of data from the Contact Center. The **Status** indicator will turn red if Reporting for Contact Center encounters problems downloading Contact Center data. An error message will be displayed directly below the Status field, indicating the problem. Refer to the *Reporting for Contact Center Troubleshooting and Maintenance Guide* (NN40020-402) on the type of error messages that can be displayed and how to troubleshoot them.

Time is the time in hours, minutes, and seconds that the current download has been running. This data is updated every 9-10 seconds.

Processing Calls From displays the start date and time of the current data being processed. Reporting for Contact Center will request data from the Contact Center from this date to the latest call data in the Contact Center. This is the download period. The **RCC Database Update Complete** field indicates how far through the download period the download process is in terms of time, not in terms of calls.

For example, if the percentage completed figure is 50% and the **Calls Extracted from Received Data** is 125, this does not mean the download will be complete when the **Calls Extracted from Received Data** reaches 250. Rather, it means that the download has processed 50% of the download period and has extracted 125 calls.

Total Contact Center Calls in the Database indicates the total amount of calls stored in the Web Host PC database, which includes the **Calls Extracted from Received Data** figure.

Note: The time to download the historical data from the Contact Center and to store it in the Web Host PC database depends on the amount of time the Contact Center has been recording historical data prior to being connected to the Web Host PC and the amount of call traffic that your Contact Center handles.

As a general guide, 30,000 calls take between 6 and 18 hours, depending on the level of network traffic and the speed of your Web Host PC.

Note: You can use your PC as normal during the download, but do not reset it or power it off.

When the download is complete, the download status field shows a 100% complete status.

Your browser page may time out before the download is complete. This is not an error. Microsoft Internet Information Services has a setting that dictates how long it waits before closing a web page. As the download completes, you are informed of the status in the Download Status field. The Administration Menu page appears, see Figure 52: Administration Menu page.

Administration Menu

When an Administrator logs in (unless they are logging in with the default password of 0000), they view the Administration Menu page. See Figure 52: Administration Menu page.

> Note: To remind you that you logged in as an Administrator, **Administration** appears in the blue bar at the top of each Administration page.

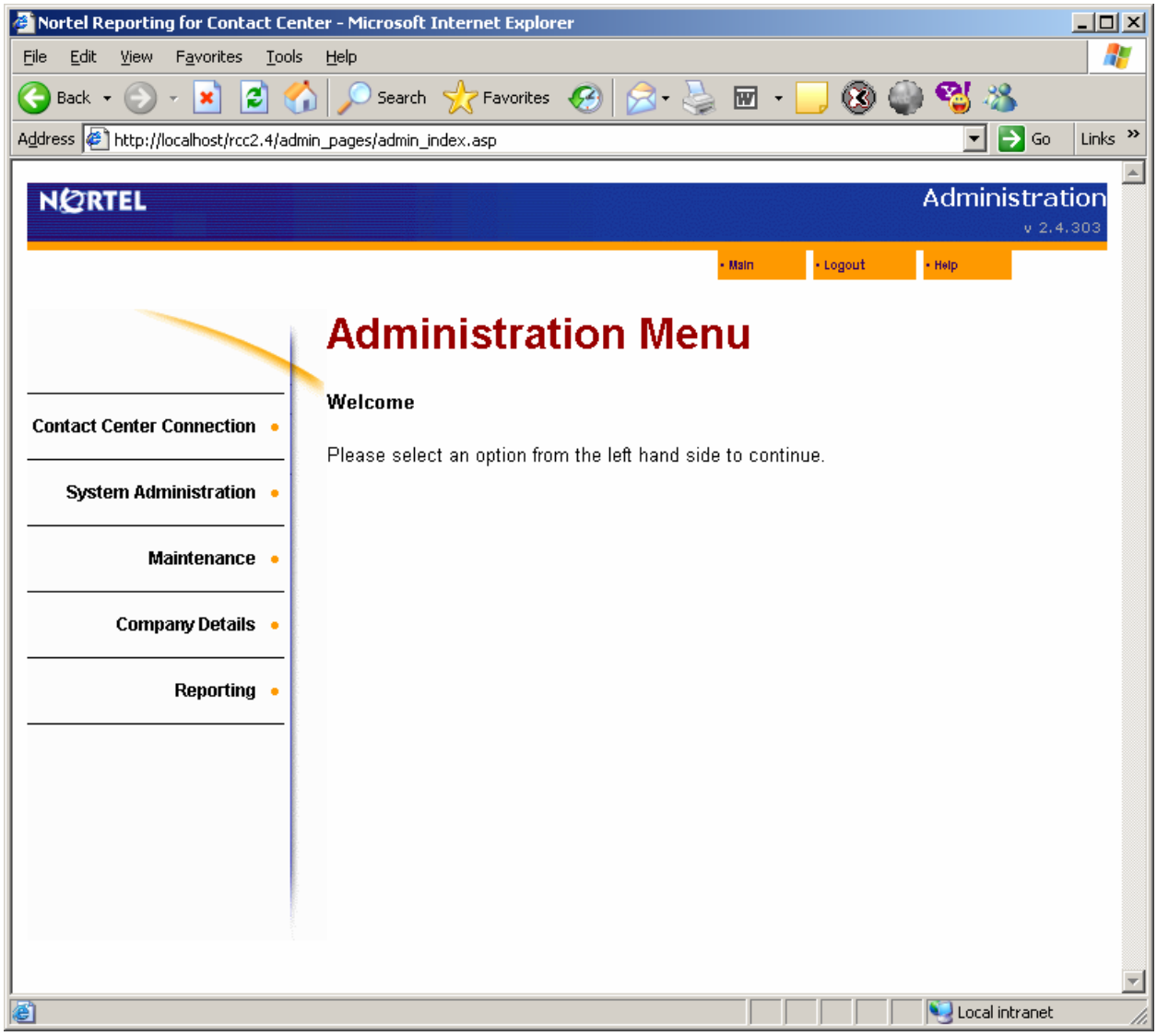


Figure 52: Administration Menu page

The available Administrator options appear in the navigation pane on the left side of the page.

For information about the Contact Center Connection, refer to Contact Center Connection on page 58. The following sections describe the System Administration, Maintenance, Company Details, and Reporting options.

System Administration

Select **System Administration** to view the **System Administration Menu** page shown in Figure 53: System Administration Menu page.

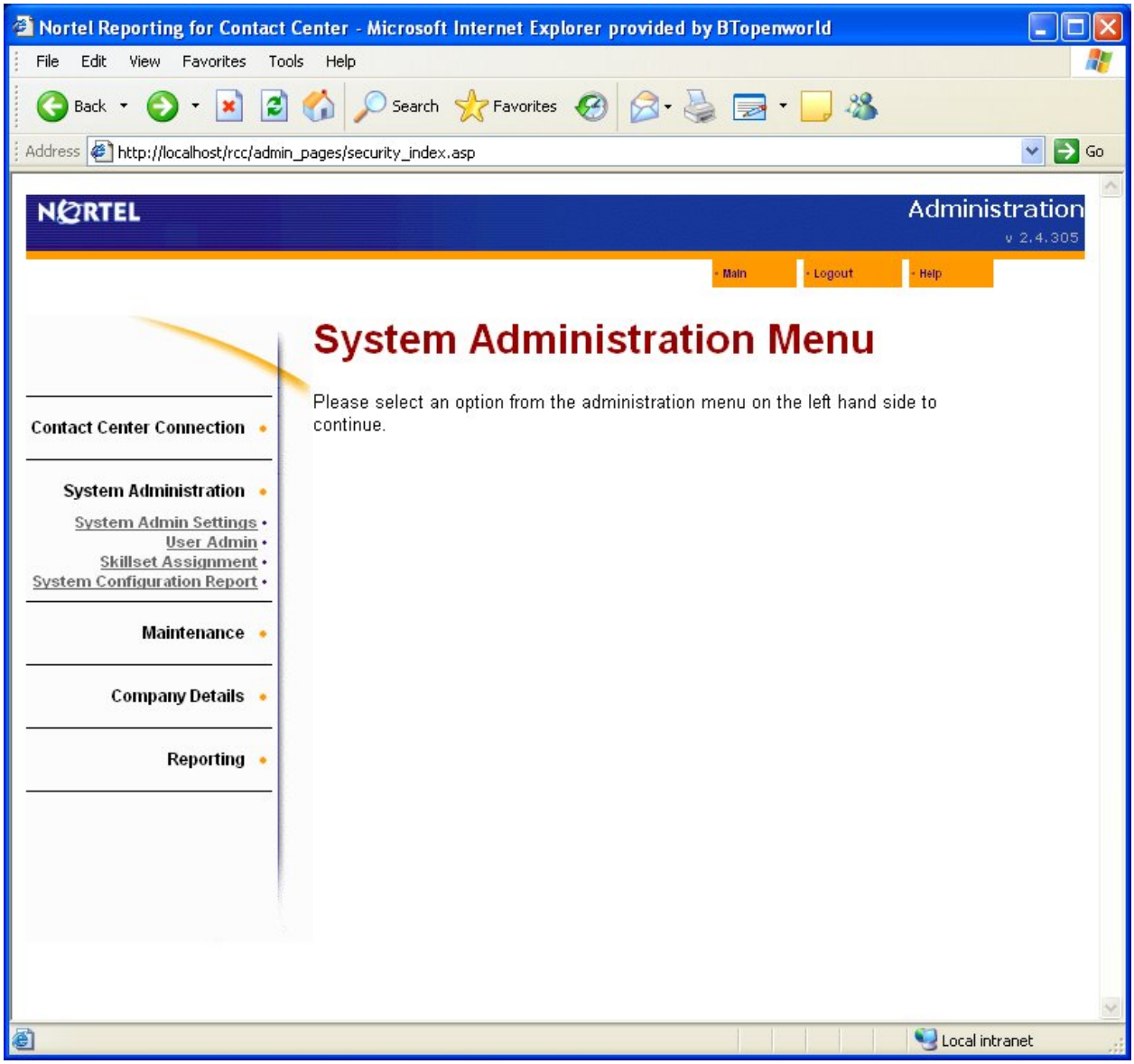


Figure 53: System Administration Menu page

The System Administration Menu provides the following options:

- System Admin Settings — change the username and the password for the default Nortel Reporting for Contact Center Administrator
- User Admin — create Users
- Skillset Assignment — assign Skillsets to Users
- System Configuration Report — view and print the System Configuration report

System Admin Settings

System Admin Settings is a special utility that allows you to change the settings for the single, pre-defined Administrator that is supplied, ready-defined, with Nortel Reporting for Contact Center. You can use System Admin Settings to change the name of the System Administrator or change their password, or both. In either case, you must enter the current System Administrator password to confirm that you have authority to make these changes.

!	Do not use System Admin Settings to change the username and password of other Users who are configured as Administrators. To change the details of those Administrators, use the User Admin Edit feature, described in User Admin.

Select **System Admin Settings** to view the **System Administrator details** page, shown in Figure 54: System Administrator details page.

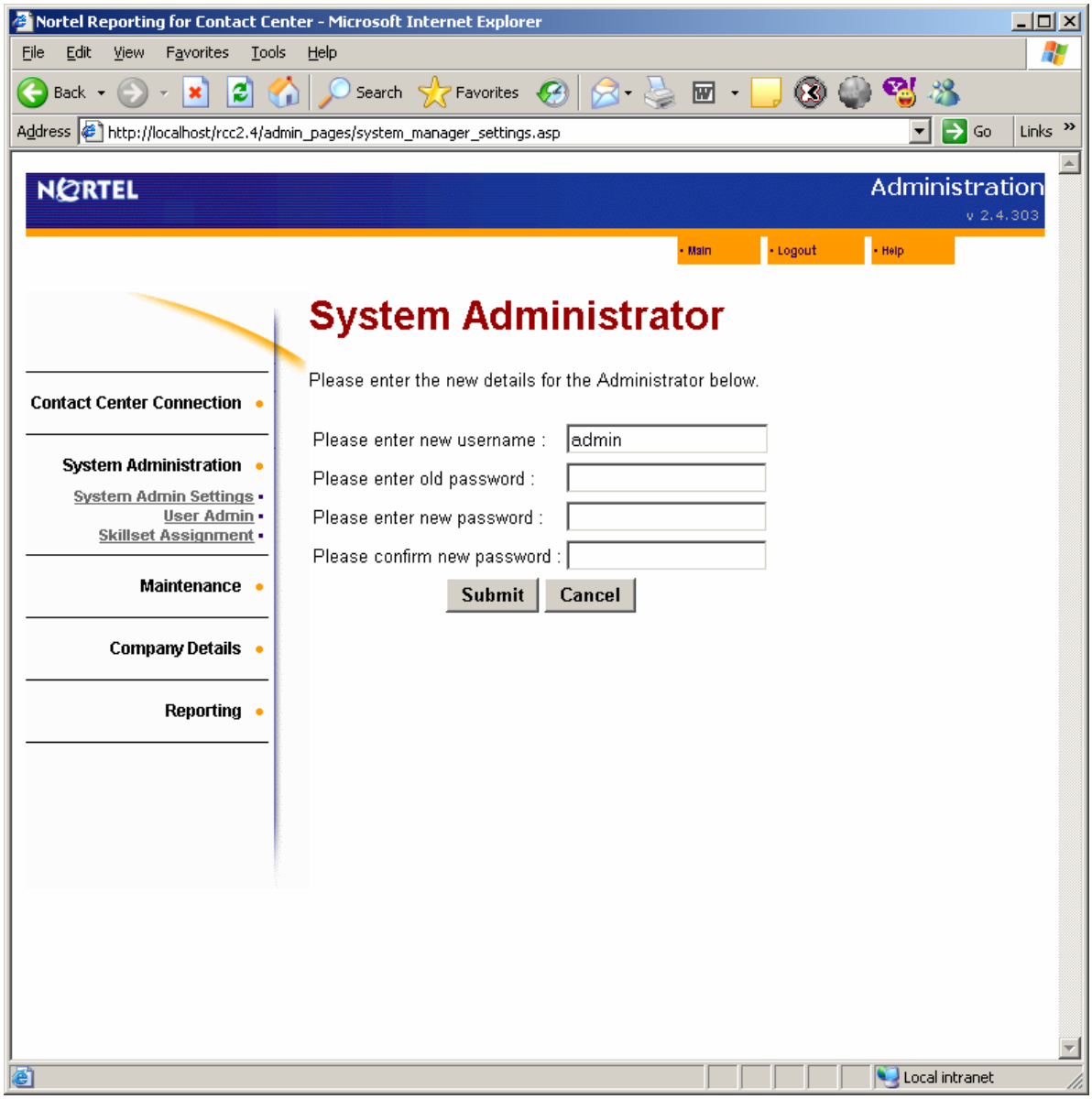


Figure 54: System Administrator details page

To change the name of the System Administrator, provide a new name in the **Please enter new username** field, and the current Administrator password in the **Please enter old password** field.

To change the password, provide the new password in the **Please enter new password** field, and confirm the password by entering the same password in the **Please confirm new** password field.

After you make the necessary changes, click **Submit**. The **System Administration Menu** page shown in Figure 53: System Administration Menu page appears.

User Admin

The User Admin option allows you to add, delete, edit the settings for, or reset the password for a User.

> **Note**: A User is not an Agent. A User is someone you wish to have access to the Nortel Reporting for Contact Center system, to monitor Skillsets through the Real Time screens and to be able to obtain Historical Reports on those Skillsets.

You do not need to enter all your Contact Center Agents into Nortel Reporting for Contact Center (although you can, if you wish). Typically, you enter Skillset Supervisors and other Management personnel who need information about the performance of the Contact Center.

Select **User Admin** to view the **User Admin** page, shown in Figure 55: User Admin page.

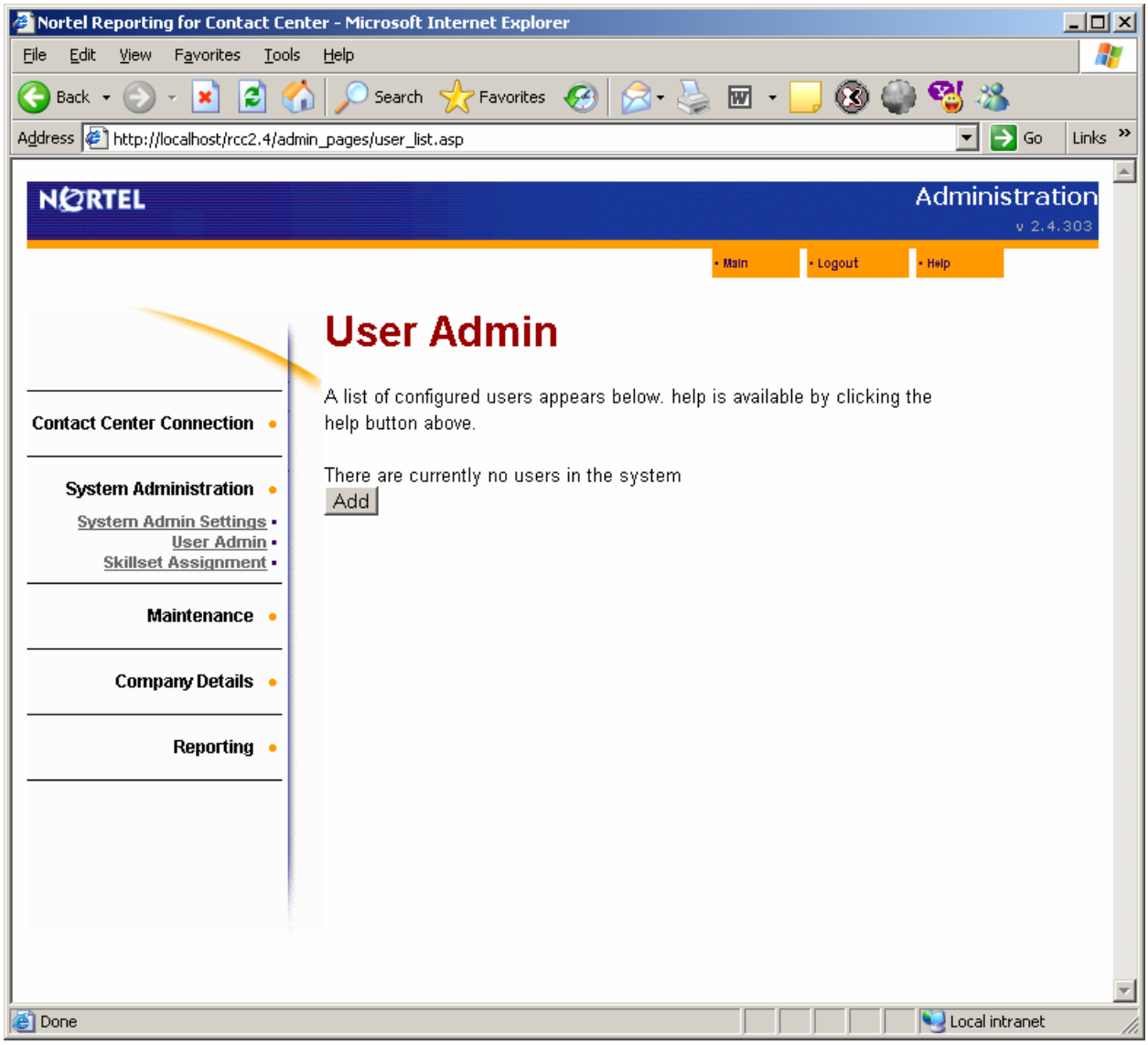


Figure 55: User Admin page

Add Users

The first time you see this page, no Users are defined. To add users, click **Add**. The Add User page, as shown in Figure 56: Add User page appears.

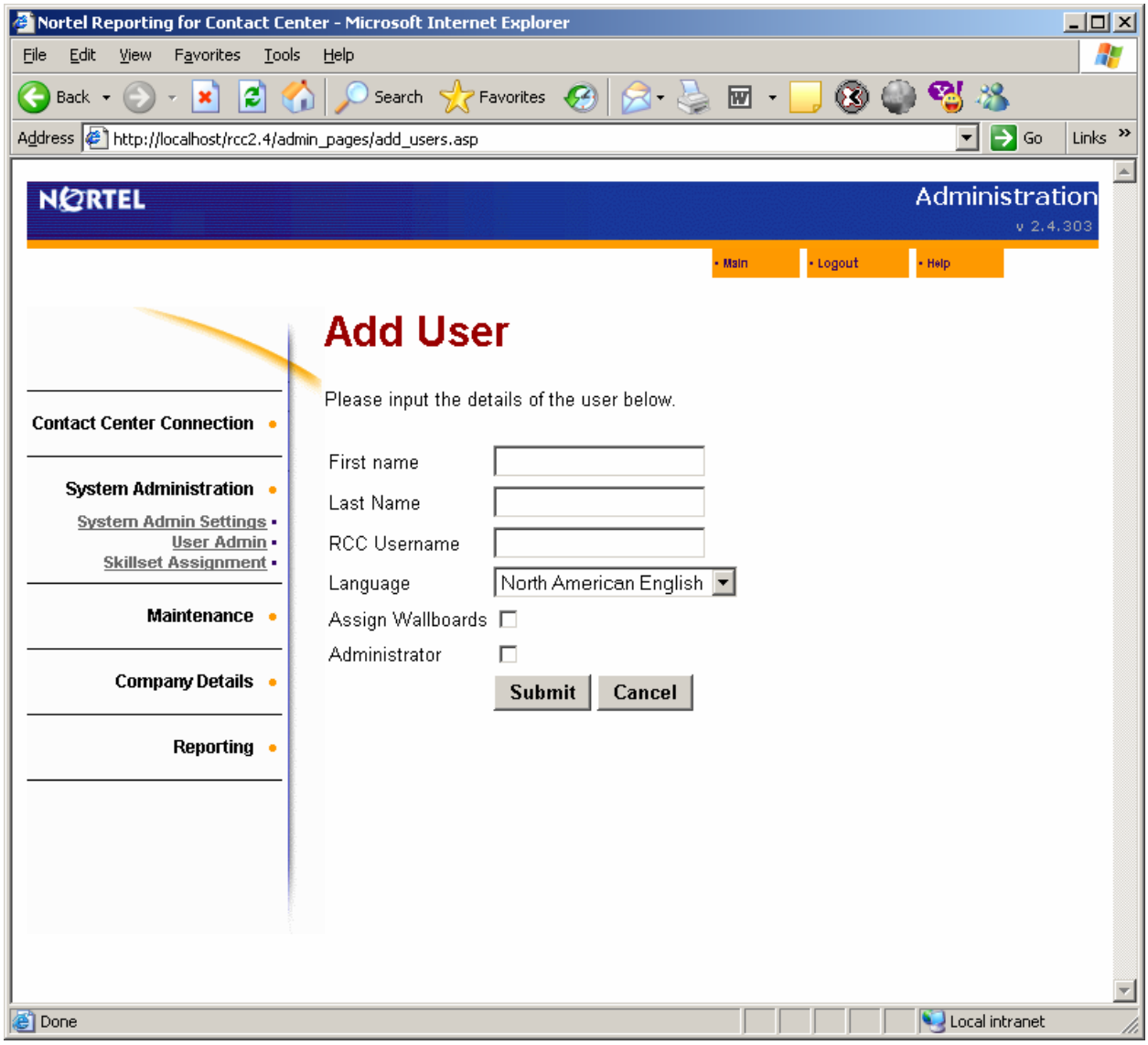


Figure 56: Add User page

This page allows you to enter the details of the new User. Follow these steps:

1. In the **First name** and **Last name** fields, enter the User's first and last names.

2. In the **RCC Username** field, enter the RCC Username, which is the name the User will use to log on to Nortel Reporting for Contact Center.

3. From the **Language** list, specify the User language preference, which dictates the language used to display the Nortel Reporting for Contact Center Web page.

4. If the User is able to configure wallboards (for their assigned Skillsets), select the **Assign Wallboards** check box. See Table 1: Administrator and User Permissions.

5. If the User is also an Administrator, select the **Administrator** check box whether the User is a standard User or an Administrator.

Note: The System Administrator, Users created as Administrators, Users who can Assign Wallboard and Standard Users have different administration capabilities regarding other Users, Skillset Assignment, and Wallboard Assignment. See Table 1: Administrator and User Permissions.

Permission Level	Capabilities
Standard Users	These are Users who were created without either the Administrator or the Assign Wallboards check boxes selected. These Users cannot perform configuration of other Users, and they cannot change their own settings. They also cannot assign or work with Wallboards. Standard Users have access only to the Skillsets that were assigned to them by the System Administrator.
Users with the Assign Wallboard Box Checked (Wallboard Users)	These are Users who were created without the Administrator check box selected. These Users cannot perform configuration of other Users, and they cannot change their own settings. They can assign and work with Wallboards. Wallboard Users have access only to the Skillsets that were assigned to them by the System Administrator.
Users with the Administration Box Checked (User Administrators)	These are Users who were created with the Administrator check box selected. These Users can perform configuration and editing activities on other Users, including creating Users and assigning Skillsets to them. They cannot change their own settings, however, apart from resetting their own password. If the Wallboard check box was selected when their own account was created, they can assign and work with Wallboards. User Administrators have access only to the Skillsets that were assigned to them by the System Administrator. You should designate a User as an Administrator only if the designation is required so that the User can specify and change fundamental configuration settings within Nortel Reporting for Contact Center.
System Administrator	This is the default Administrator account that is created when Nortel Reporting for Contact Center is installed. This User has full access to the system and to all configuration options. They can create, edit, and delete Users, and they can assign Skillsets to Users. They can also reset User passwords, including the System Administrator's password. Note that they are the only user who can do this. The System Administrator has access to any Skillset.

Table 1: Administrator and User Permissions

Note: The default password for all new Users is 0000. The first time they login to Nortel Reporting for Contact Center they are prompted to change their password.

In the example shown in Figure 57: Details for new User Mary Smith, the new user Mary Smith has been added, with the RCC Username of **MaryS**, she is going to receive the Web pages in English, and, while she can configure wallboards for her assigned Skillsets, she is not a full Administrator.

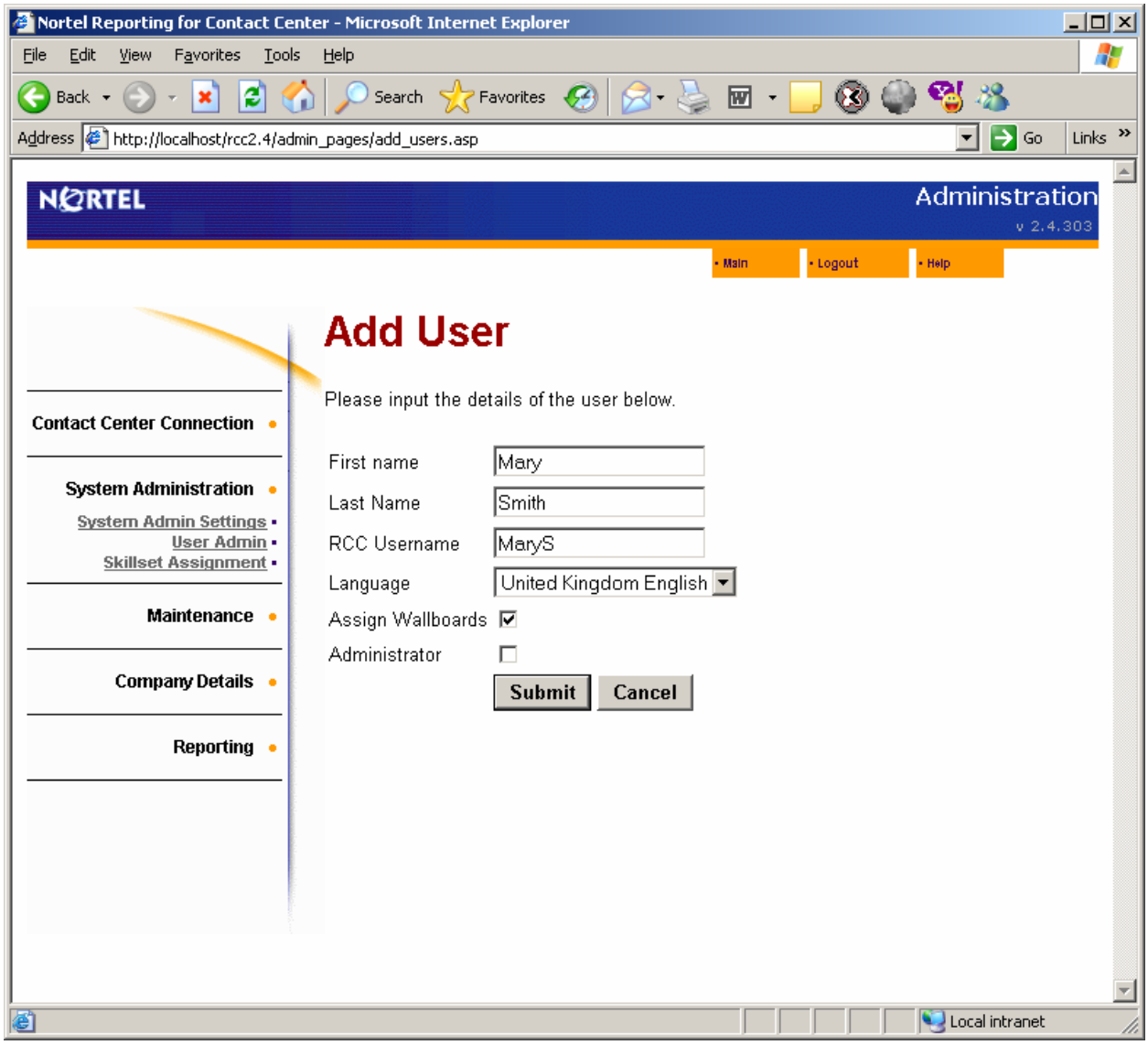


Figure 57: Details for new User Mary Smith

6. Click **Submit** to save the details of the newly entered User.

7. A dialog box asks whether you wish to add more Users. If you choose to add more users, click on the **OK** button, otherwise click on **Cancel**. If you had clicked on **OK**, the Add User fields are cleared and you can enter the details of your next new User. If you decide not to add more Users at this time, you are returned to the User Admin page shown in Figure 55: User Admin page.

The newly added User now appears in the list of configured users on the User Admin page. To view details about a specific User, select the User's name from the list. Click the **Edit** button next to selected User to Edit the details of the user (see Edit Users). To Delete the User from the system click on the **Delete** button (see Delete Users). To reset their password

to 0000 if they have forgotten their password click on the **Reset Password** button (see Reset Password).

Edit Users

To edit User details, select the User from the list of configured users and click **Edit.** The Edit user page, shown in Figure 58: Edit User page appears.

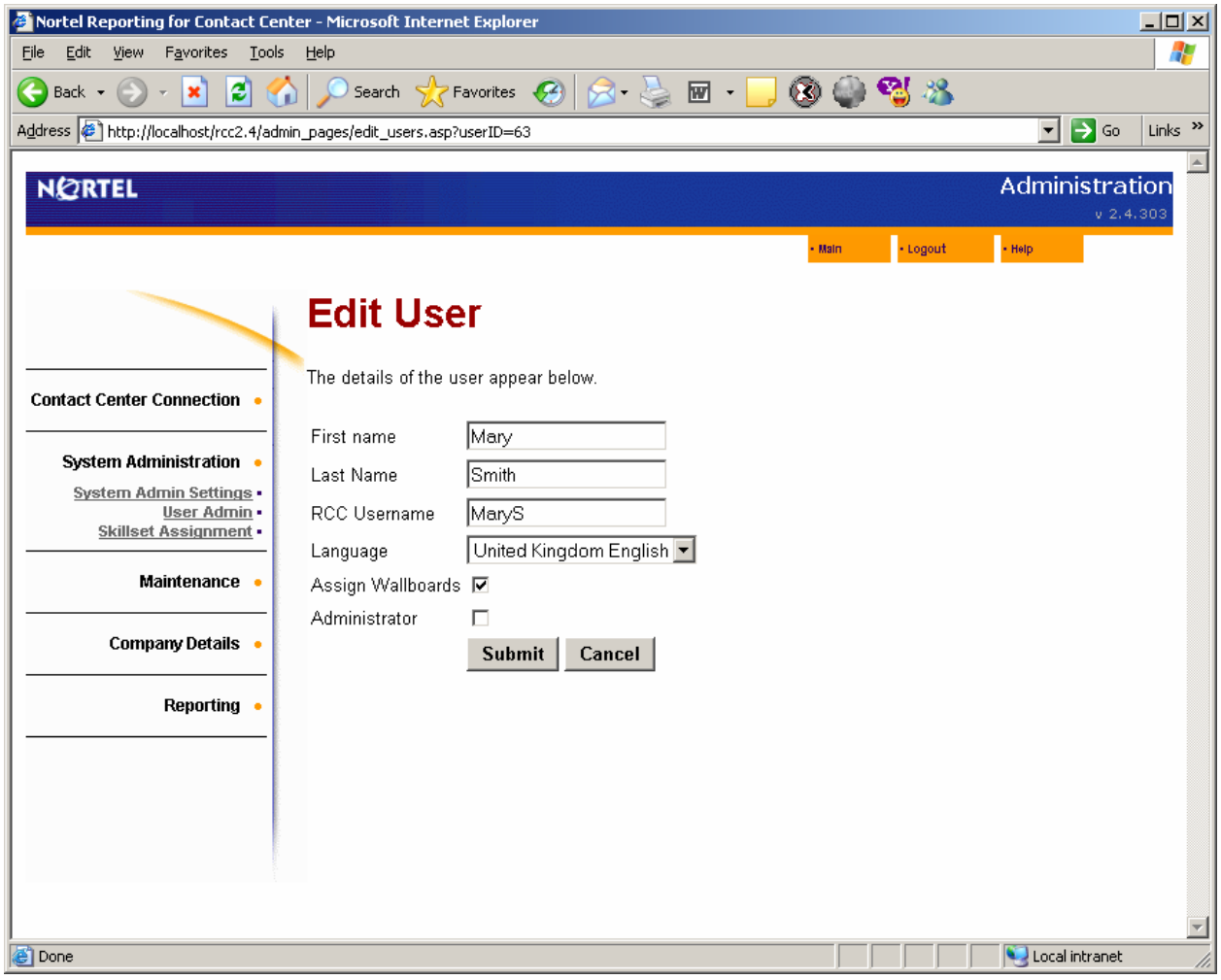


Figure 58: Edit User page

To edit User details, make any necessary changes, and then click **Submit**. For more information about the fields on the Edit User page, refer to Add Users.

Delete Users

To delete a User, select the User from the list of configured users and click **Delete**.

> **Note**: After you delete a User, you cannot retrieve the deleted User for later use. For any subsequent inclusion of that User, later you must use the Add User page (see Figure 56: Add User page) and re-enter User details.

When you click **Delete** you are prompted to confirm that you wish to remove the User. If you do not wish to remove the User, click **Cancel**; if you are certain you wish to remove the User, click **OK**.

In either case, the User Admin page appears. See Figure 55: User Admin page. If you removed a User, that User name no longer appears in the list of configured Users.

Reset Password

Use the **Reset Password** option when a User has changed their password and forgotten what the password is.

This option allows you to reset the User password to 0000.

When the User next logs on, they use the password 0000, and they must then select a new password.

Select the User name from the list of configured users and click **Reset Password.** You are prompted to confirm that you wish to reset the password for the User. If you do not wish to reset the password, click **Cancel.** To reset the password, click **OK**.

In either case, the User Admin page appears. See Figure 55: User Admin page.

Skillset Assignment

The Skillset Assignment option allows you to assign Skillsets to Users. Assigning Skillsets to a User allows the User to view those Skillsets in the Real Time screens and to obtain Historical Reports on those Skillsets.

You can assign multiple Skillsets to a User, and a Skillset can be assigned to multiple Users.

Select **Skillset Assignment** from System Administration Menu shown in Figure 53: System Administration Menu page. The Skillset Assignment page shown in Figure 59: Skillset Assignment page appears.

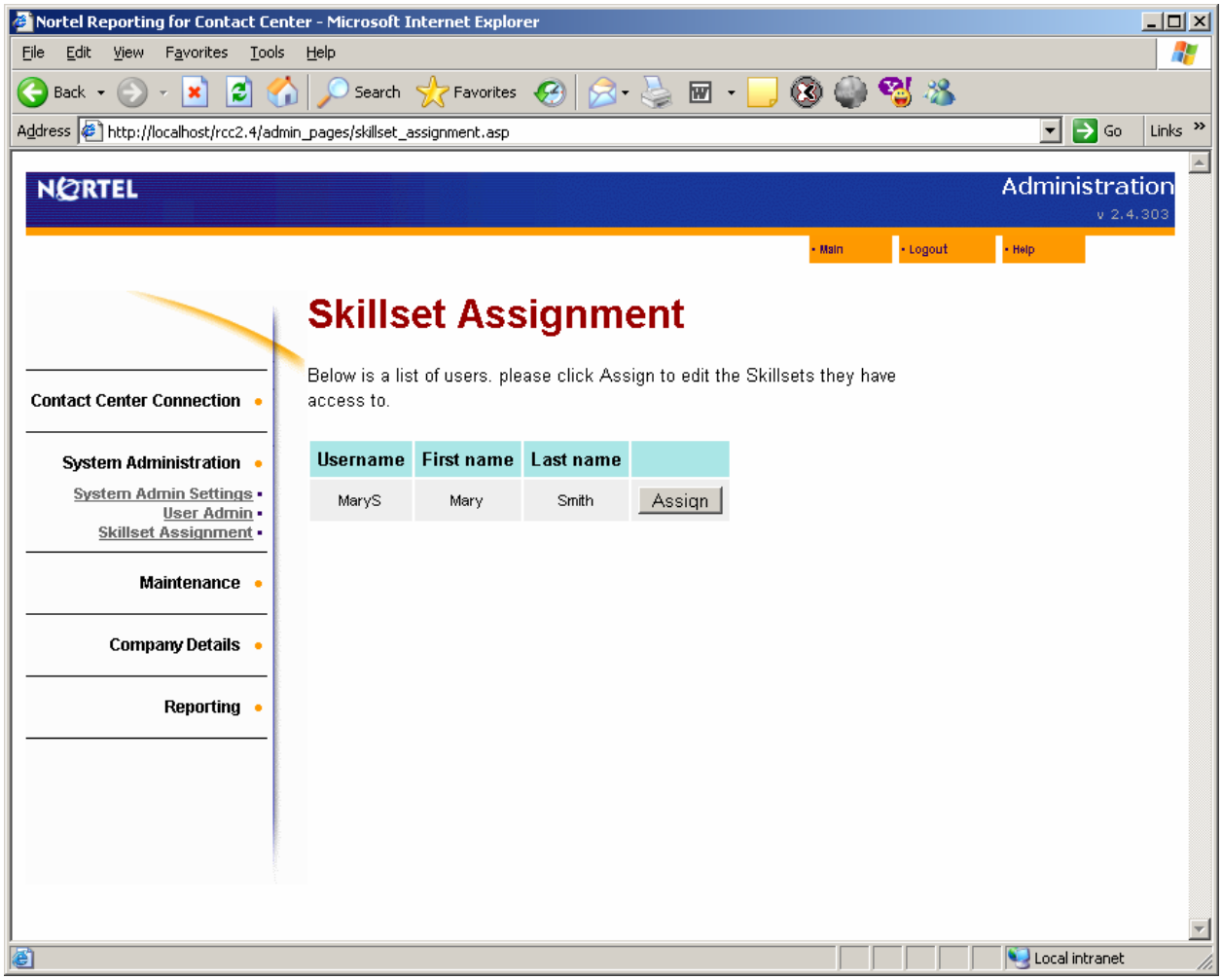


Figure 59: Skillset Assignment page

The Skillet Assignment page lists each configured User. In Figure 59: Skillset Assignment page, Mary Smith is the only configured User. Perform the following steps to assign Skillsets:

1. Click **Assign** to view the Assigned Skillsets page, shown in Figure 60: Assigned Skillsets page.

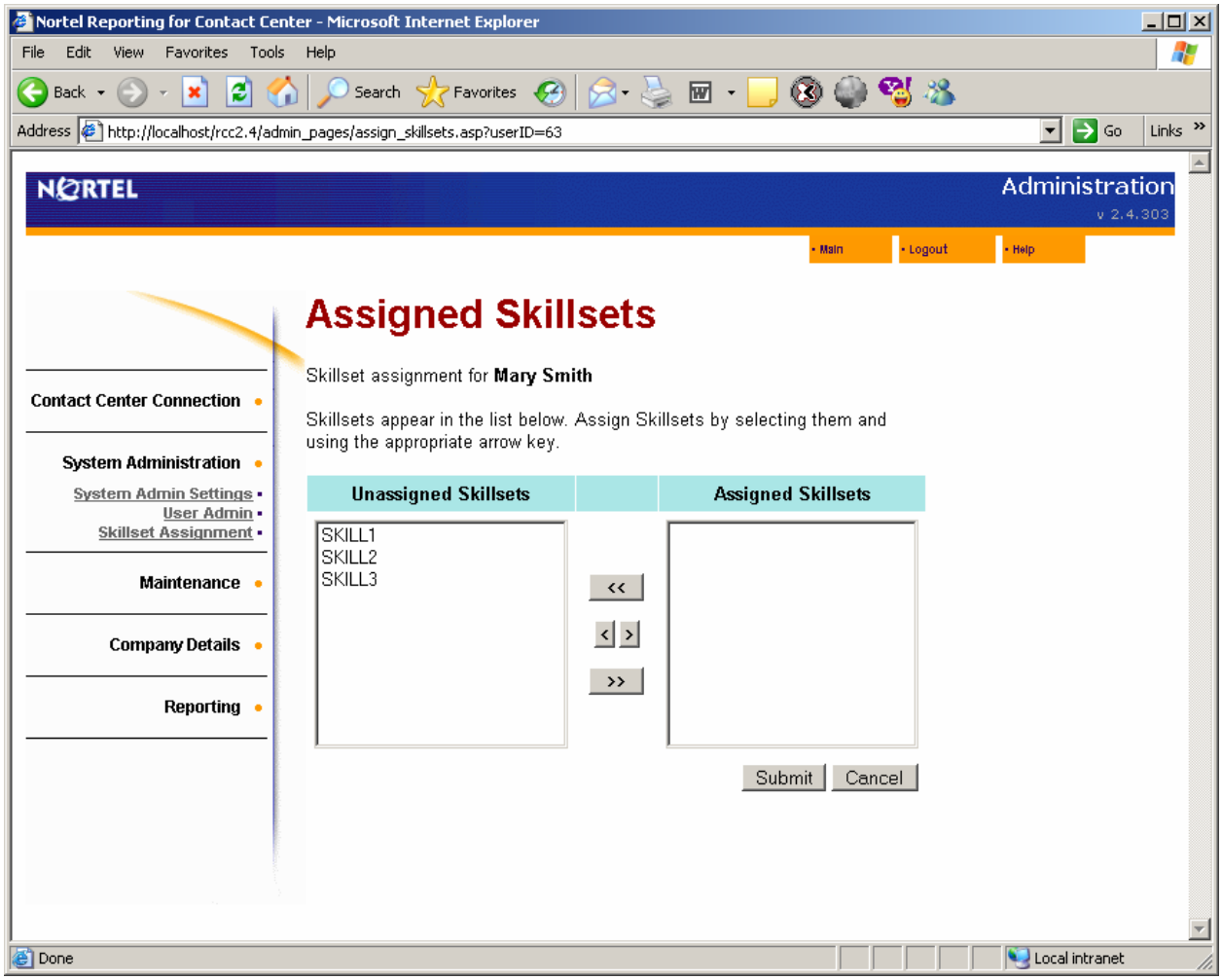


Figure 60: Assigned Skillsets page

Note: The Skillset names shown in Figure 60: Assigned Skillsets page are intended as examples only. Your copy of Nortel Reporting for Contact Center displays the Skillset names you have set up in the Contact Center using CallPilot Manager.

Note: The Skillset names are obtained automatically from the Contact Center. Your copy of Nortel Reporting for Contact Center must be connected to the Contact Center for a few moments in order for the Skillset names to appear.

2. To assign a single Skillset, select the Skillset in the **Unassigned Skillsets** list, then click the right arrow button (>). The assigned Skillset appears in the Assigned Skillsets list.

3. Continue assigning Skillsets until you assign all the Skillsets you wish to assign to this User. In the example shown in Figure 61: Skillsets Assigned to User Mary Smith, the User Mary Smith is assigned two Skillsets: SKILL1 and SKILL3.

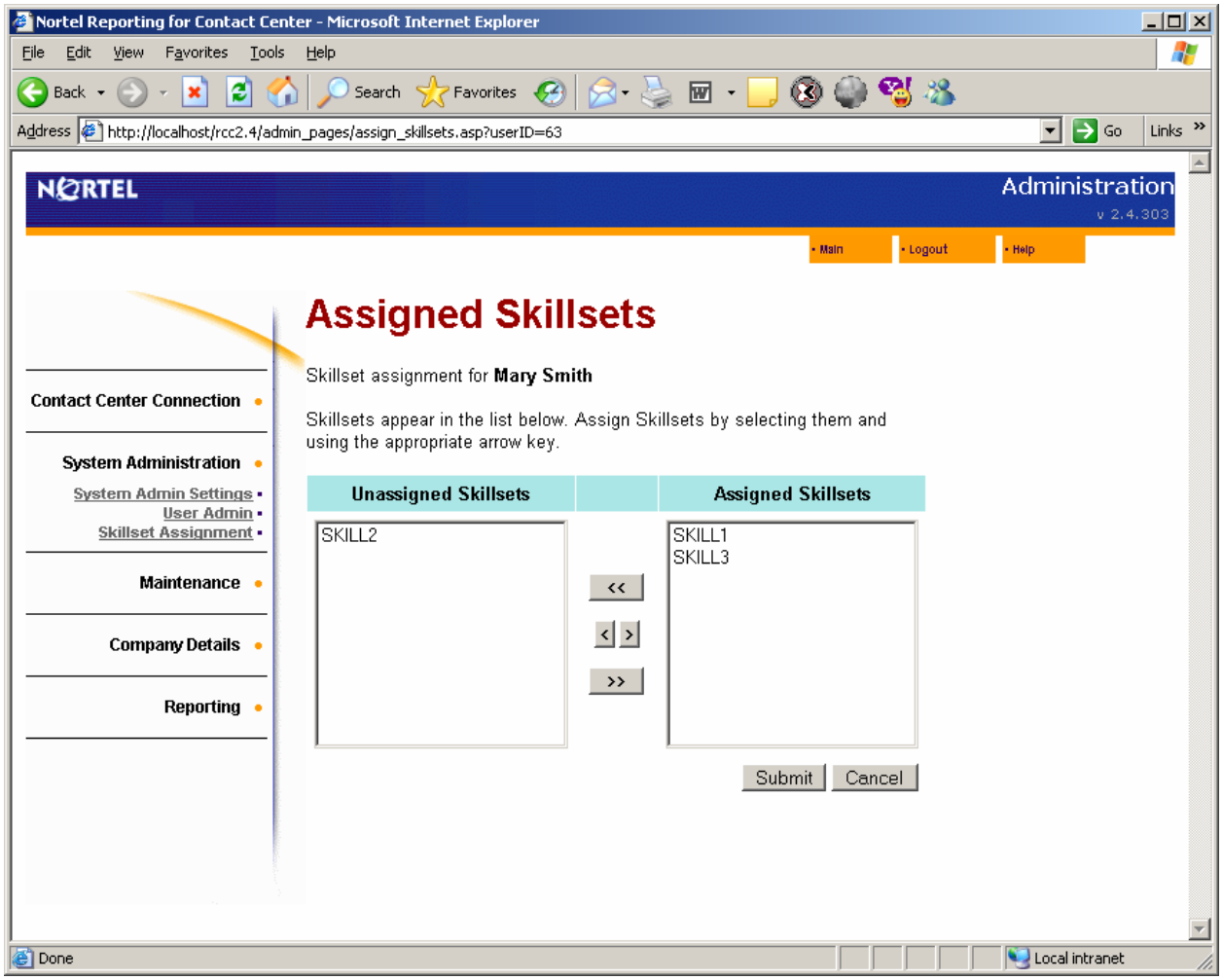


Figure 61: Skillsets Assigned to User Mary Smith

4. To move a Skillset to the Unassigned Skillsets list, select the Skillset name in the **Assigned Skillsets** list and click the left arrow button (<).

   Note: Click the double right arrow button (>>) or the double left arrow button (>>) to assign or un-assign all the Skillsets.

   Note: To assign or un-assign more than one Skillset name in the Assigned Skillsets or Unassigned Skillsets list, hold down the Control (**Ctrl**) key and click different Skillset names in the list. Click the > or < button to assign or un-assign those selected Skillsets in one step.

5. When you have assigned (or unassigned) the Skillsets for a User, click **Submit**. The Skillset Assignment page shown in Figure 59: Skillset Assignment page appears.

Maintenance

The Maintenance option allows you to check the System Status and to start or stop the XML data feed logging.

Select **Maintenance** to view the Maintenance Menu page, shown in Figure 62: Maintenance Menu page.

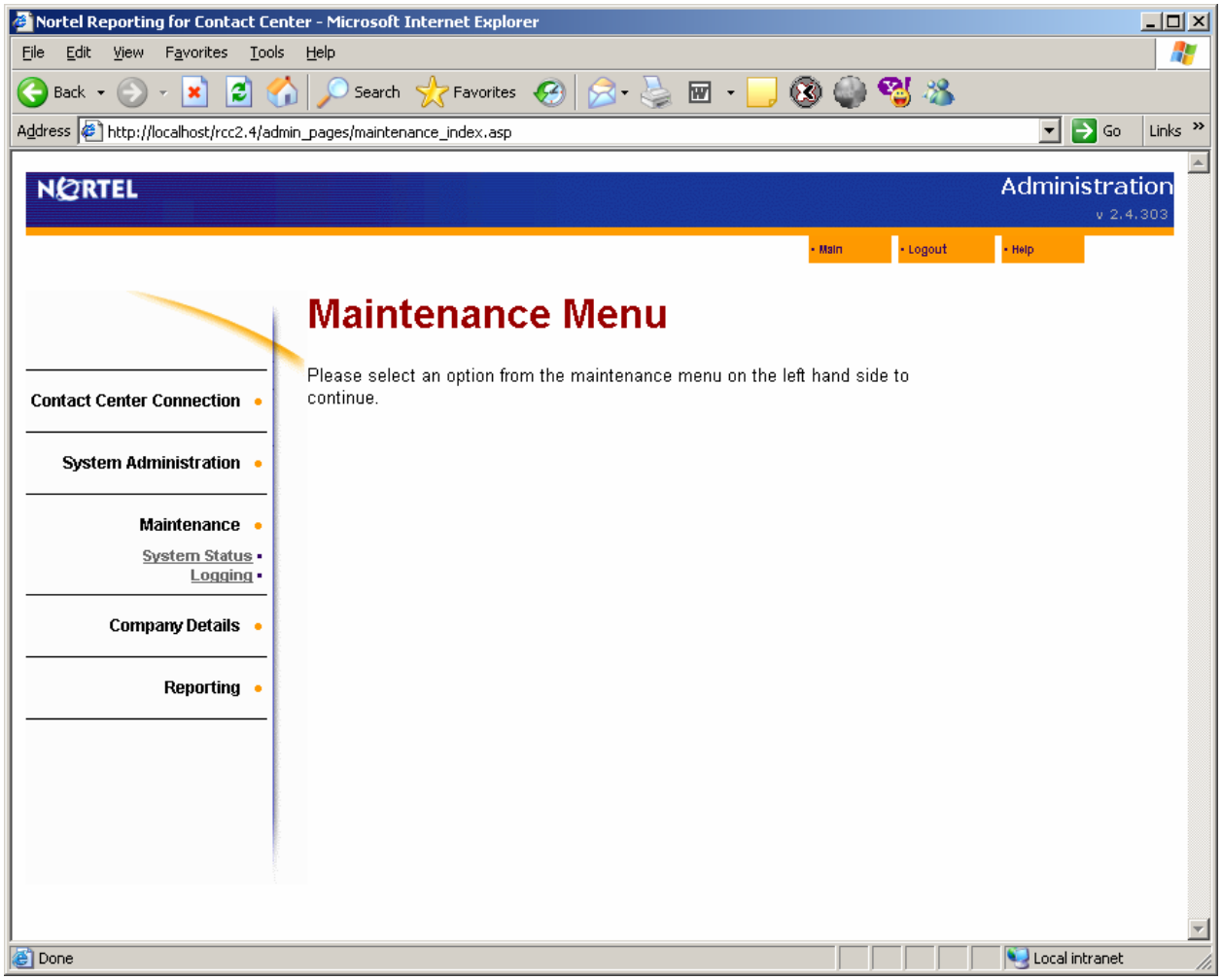


Figure 62: Maintenance Menu page

The Maintenance Menu provides the following options:

- System Status
- Logging

System Status

Select **System Status** to view the System Status page shown in Figure 63: System Status page. This page provides a variety of information relating to the current status of Nortel Reporting for Contact Center.

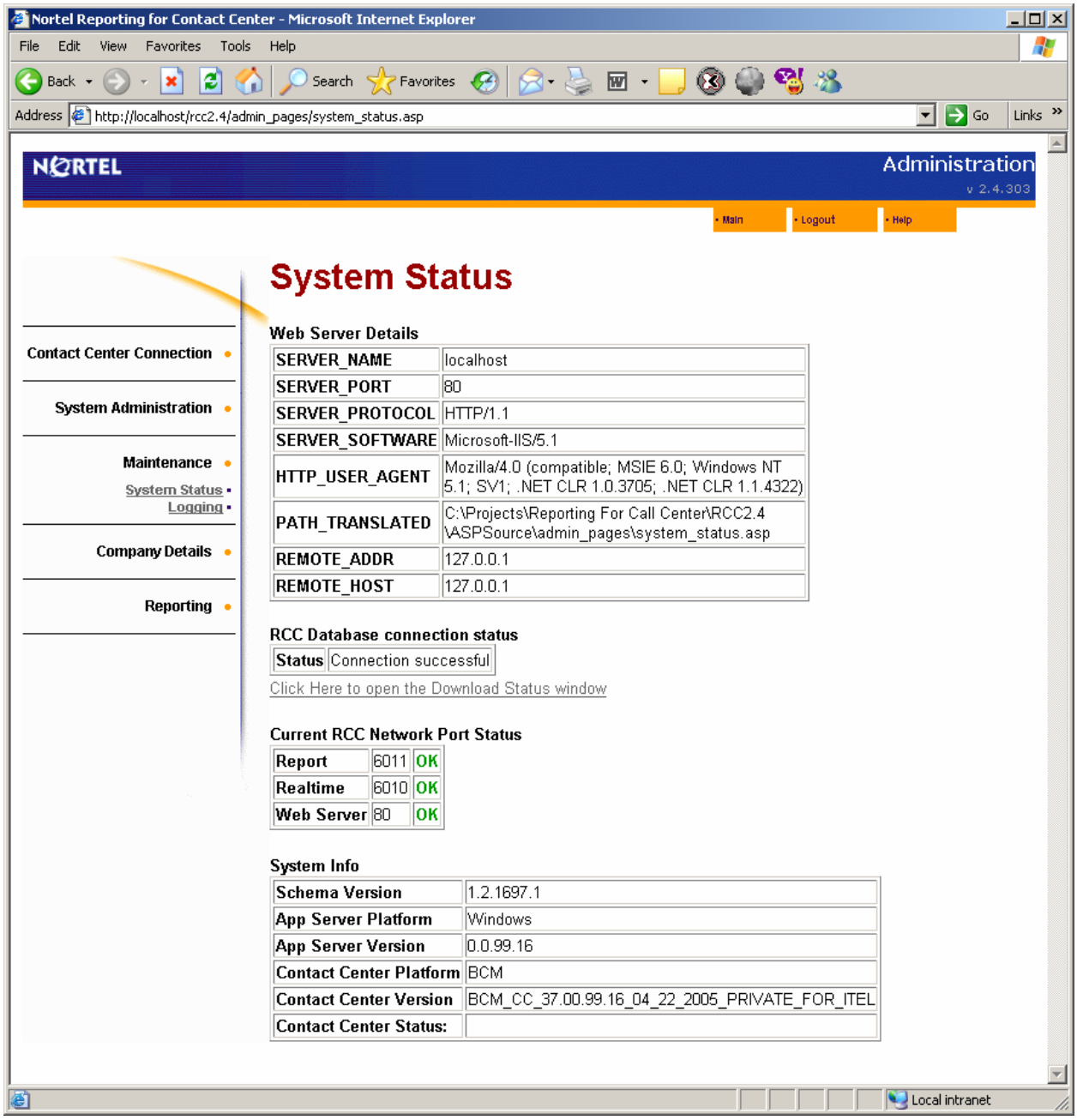


Figure 63: System Status page

You normally need to refer to this page only upon instruction of Support Personnel.

Logging

Select **Logging** to view the Logging Menu page shown in Figure 64: Logging Menu page.

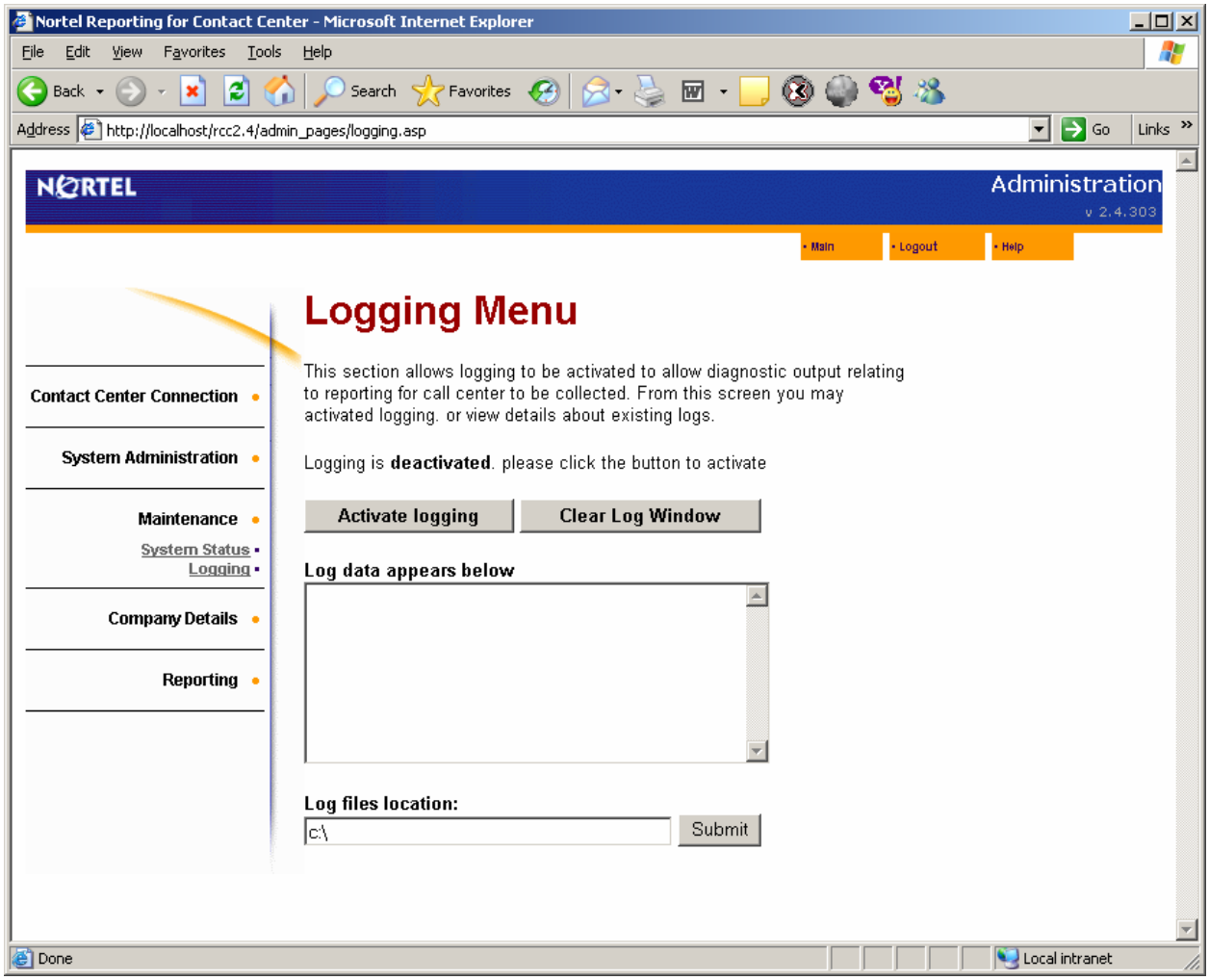


Figure 64: Logging Menu page

Various diagnostic logs are always running when Nortel Reporting for Contact Center is operational. The Logging Menu allows you to start or stop one of the diagnostic logs.

Logging is deactivated by default. To activate logging, click **Activate Logging**.

If logging is on, you see a **Deactivate Logging** button instead of the **Activate Logging** button. Click **Deactivate Logging** to stop logging, as shown in Figure 65: Logging Menu page with logging stopped.

Note: You normally stop this log only upon the instruction of Support Personnel.

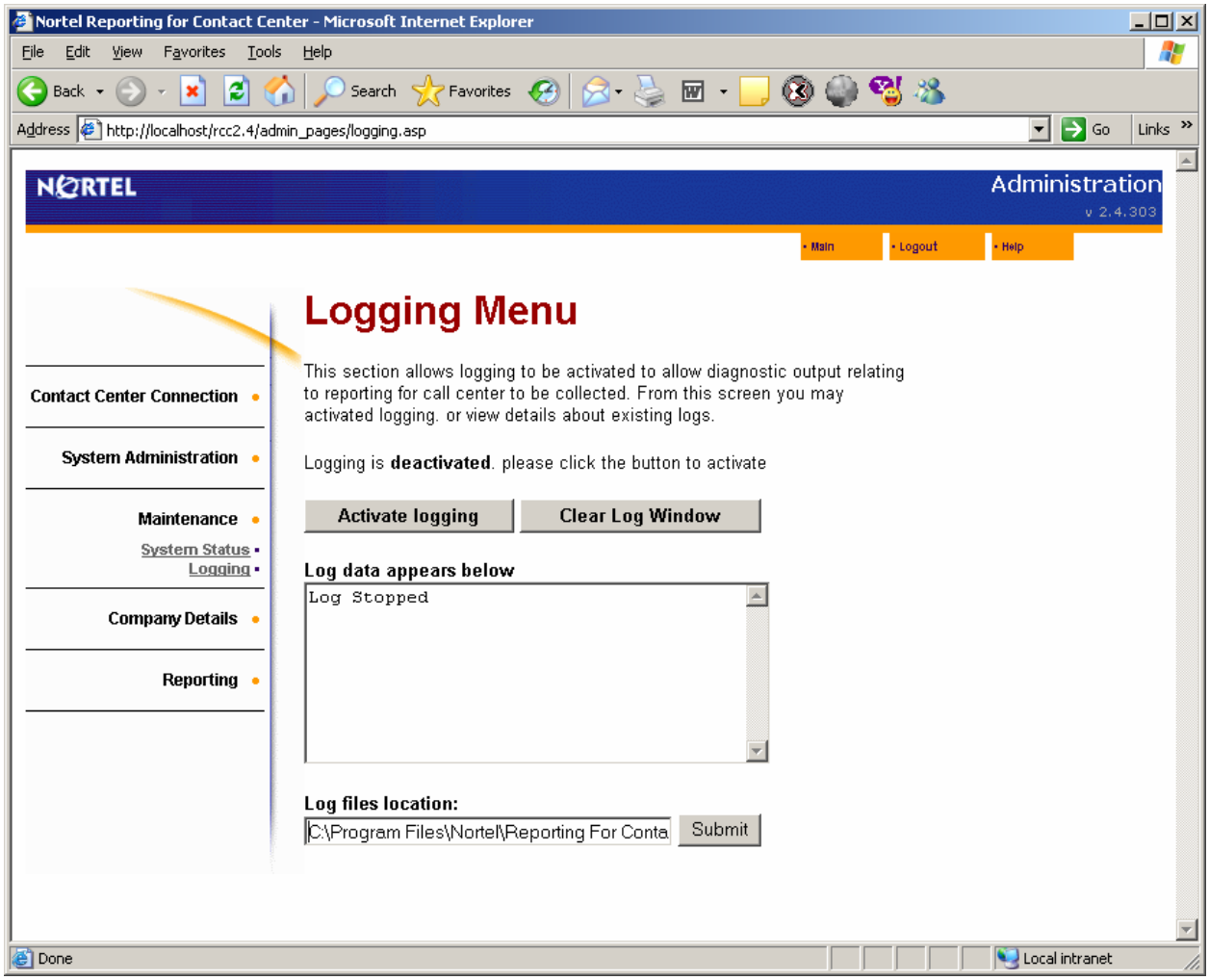


Figure 65: Logging Menu page with logging stopped

When logging stops, you again see the **Activate Logging** button. Click **Activate Logging** to again start logging.

Click **Clear Log Window** to clear any text from the Log Data Window. Clearing the Log Window does not affect the current state of logging.

The default log files location is set to the drive which Nortel Reporting for Contact Center was installed to along with the location path. If the installation was on the C:\ drive the default location path would be, C:\Program Files\Nortel\Reporting For Contact Center\Logs.

The User is able to change the log files location in the **Log files location** field. Clicking the **Submit** button will reset the log files location. To reset the log files location to the default path, perform the following:

1. On the Windows taskbar, select **Start** > **Run** and enter the pathway to the file called ModifyDatabase.bat in the RunOnce folder. The RunOnce folder is in the Reporting for Contact Center folder. If you installed Reporting for Contact Center in the default location the path to this file will be \Program Files\Nortel\Reporting for Contact Center\RunOnce\ModifyDatabase.bat on the drive on which you installed Reporting for Contact Center.

2. Click **OK** to launch the ModifyDatabase.bat file. You will see a Command Prompt window (DOS Window) open and then close.

The logging path will be reset to the default location.

Company Details

The Company Details page allows you to enter details about your company or site. See Figure 66: Company Details page. To view the page, select **Company Details**.

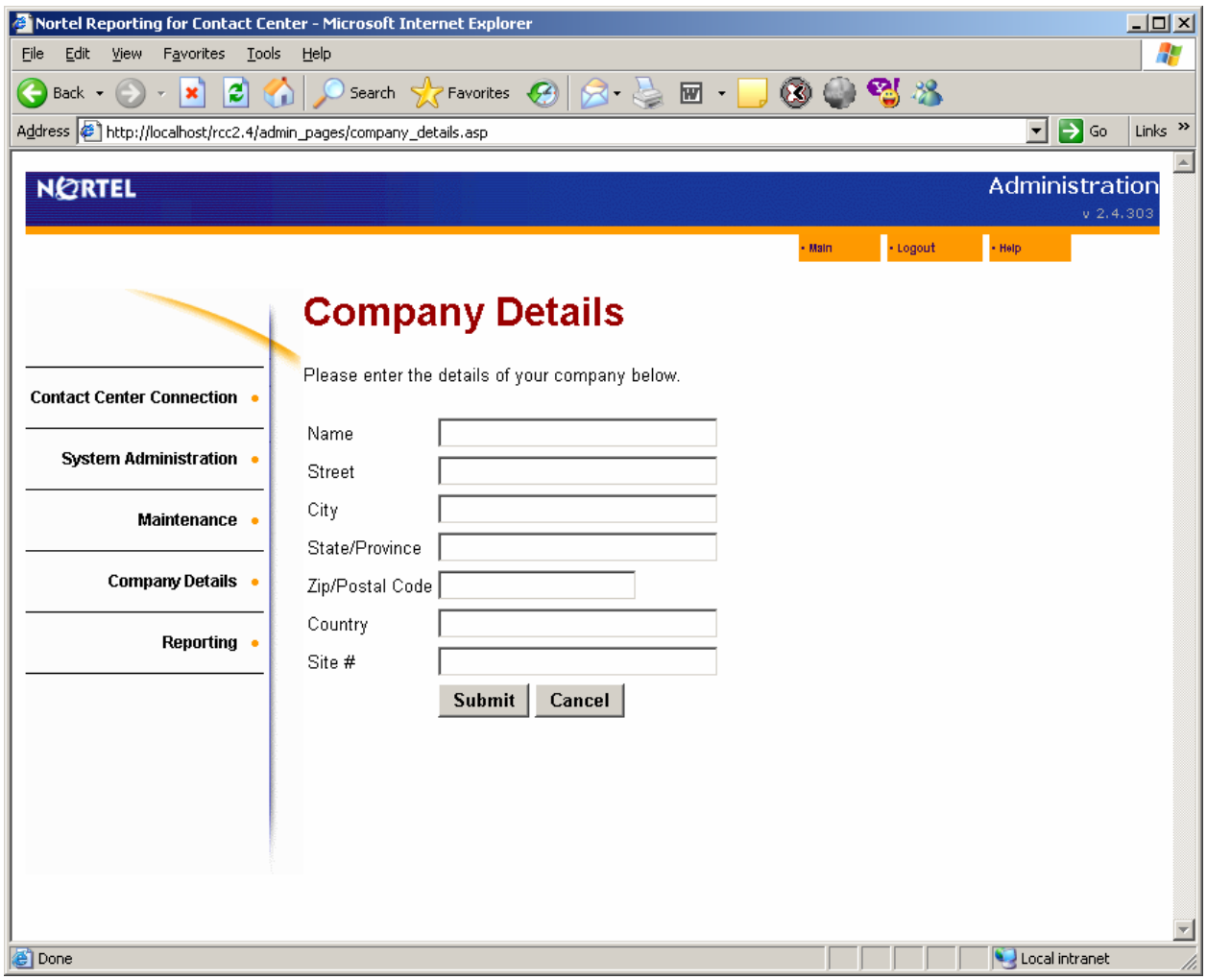


Figure 66: Company Details page

Completing this page is not a requirement for the correct operation of Nortel Reporting for Contact Center. The page provides a means of recording where the software is installed.

After the company details are entered, click **Submit** to save the details. The company details will be available in the System Configuration report and the company name will be displayed on all report headers.

From the Company Details page, the user will be returned back to the Administration Menu page.

Reporting

Click **Reporting** to view the Main Menu page, shown in Figure 67: Main Menu page.

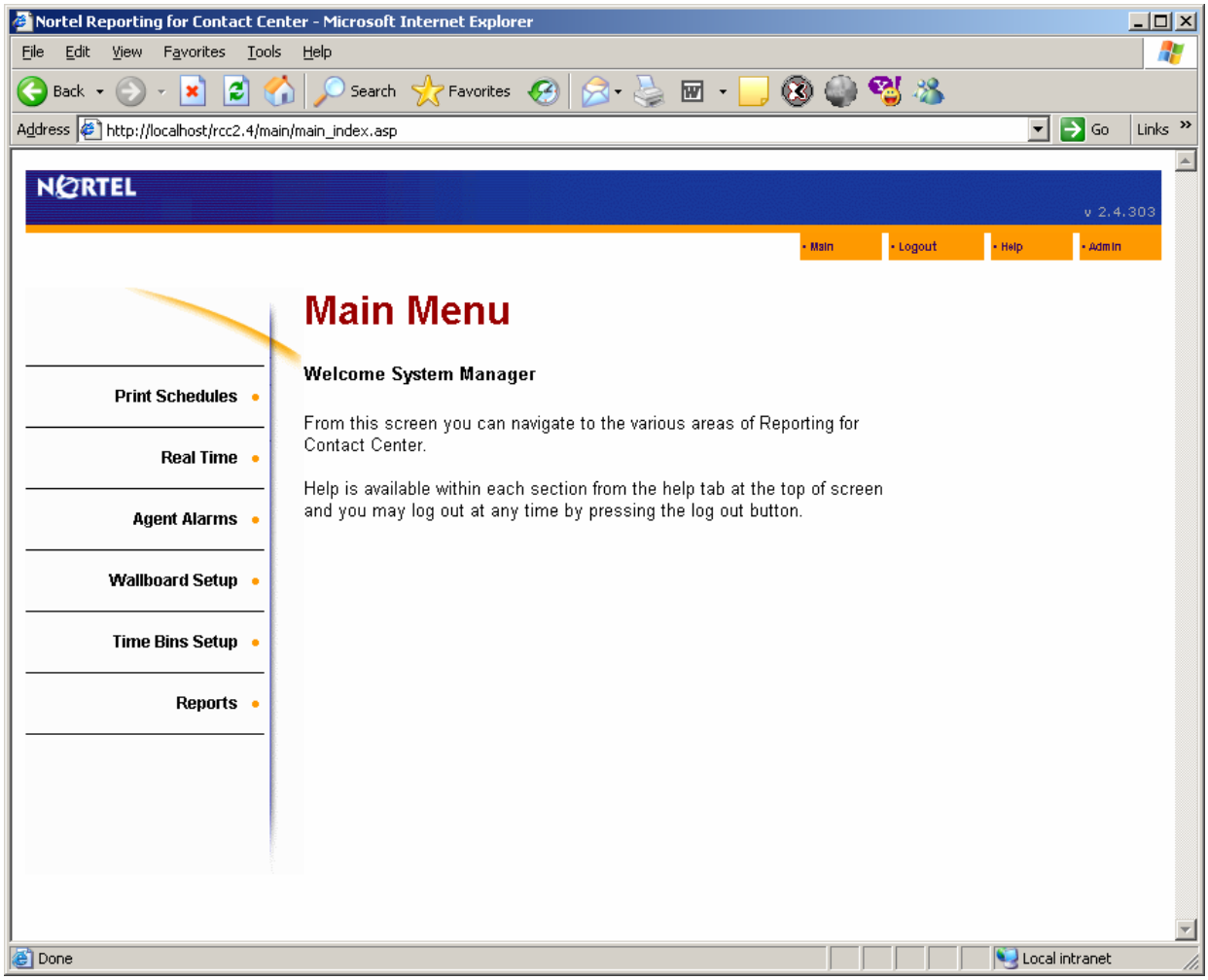


Figure 67: Main Menu page

This is the page all standard Users (that is, non-Administrative Users) view when they log on.

This option allows an Administrator to use the Nortel Reporting for Contact Center as though they were a User, to view Real Time screens, and to access the Historical Reports.

For more information, refer to the following chapter Using Reporting for Contact Center.

Using Reporting for Contact Center 5

This chapter describes how to use Nortel Reporting for Contact Center for all Users, to view Real Time screens and access Historical Reports.

Logging On

Perform the following steps to log on to Nortel Reporting for Contact Center for all Users:

1. Use Internet Explorer to go to the URL of your Nortel Reporting for Contact Center Web pages Login page.

   The URL is http://*NameOfWebHostPC*/RCC

   Where *NameOfWebHostPC* is the network name or IP Address of the Web Host PC.

   The Login page appears. See Figure 47: Login page.

   Note: If you are using the browser on the Web Host PC, you can replace NameOfWebHostPC with localhost.

   Note: You can add the Login page URL to your Internet Favorites. To add this page to your favorites in Internet Explorer, press **Ctrl**+**D** when you are at the Login page, or click **Favorites, Add to favorites.**

2. You must provide a valid username and a password to gain access to the features of Nortel Reporting for Contact Center. Before you attempt to log on, ensure that an Administrator has created a username for you.

   The first time you log on, your password is set to the default of 0000.

3. In the **Username** field, enter the Username you have been assigned. In the **Password** field, enter the default password of 0000.You must change your password after you first log on. The Change Password page shown in Figure 68: Change Password page appears.

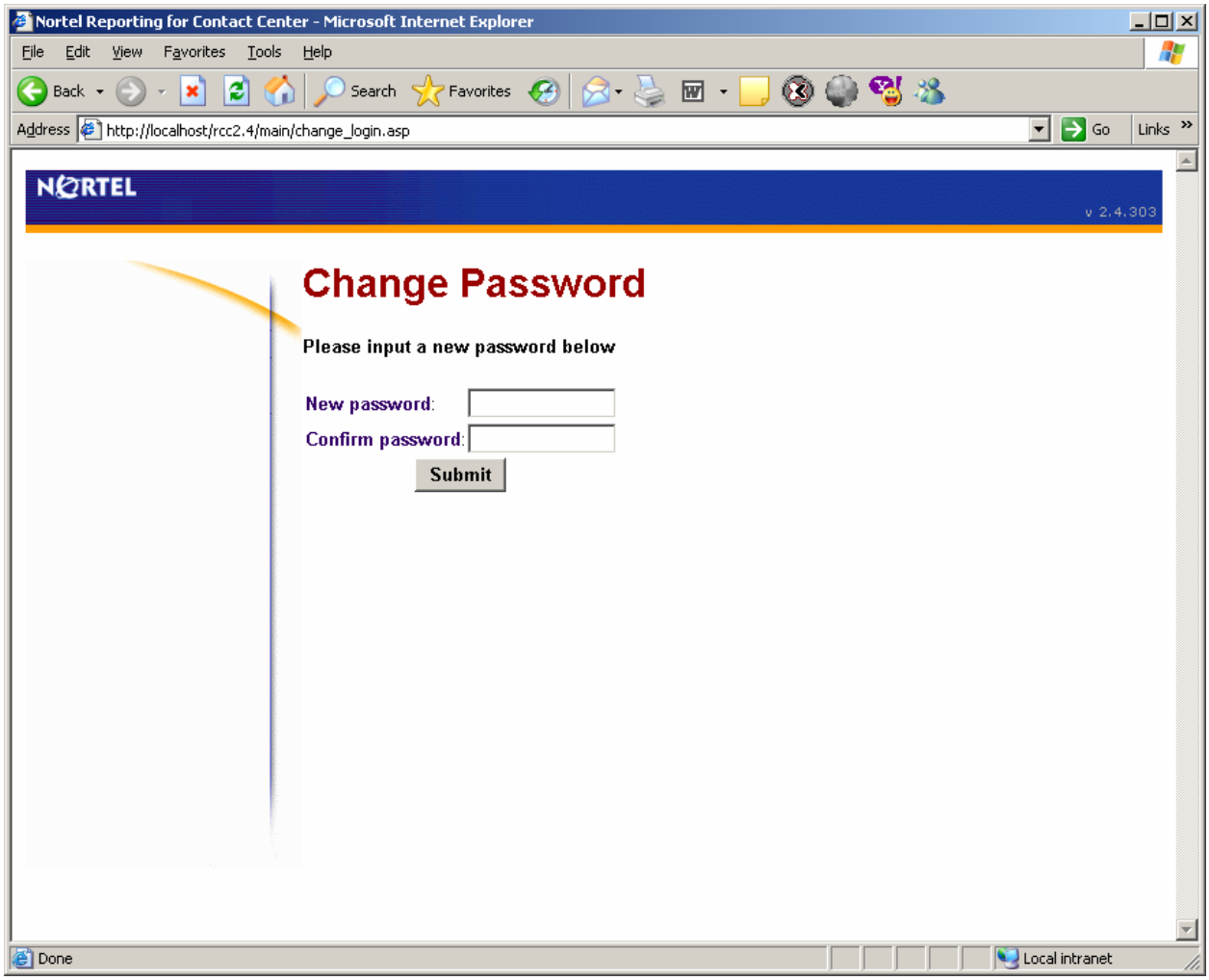


Figure 68: Change Password page

In the **New password** field, enter a new password. The password can be from 1 to 10 characters, including upper and lowercase letters and digits. It can be anything other than 0000.

4. In the **Confirm password** field, re-enter your password.

5. Click **Submit**.

   If the two passwords do not match, you receive a message that the password and confirmation do not match. Re-enter your password in both fields.

If you entered the new password correctly in both fields, the Main Menu page shown in Figure 69: User Main Menu page appears.

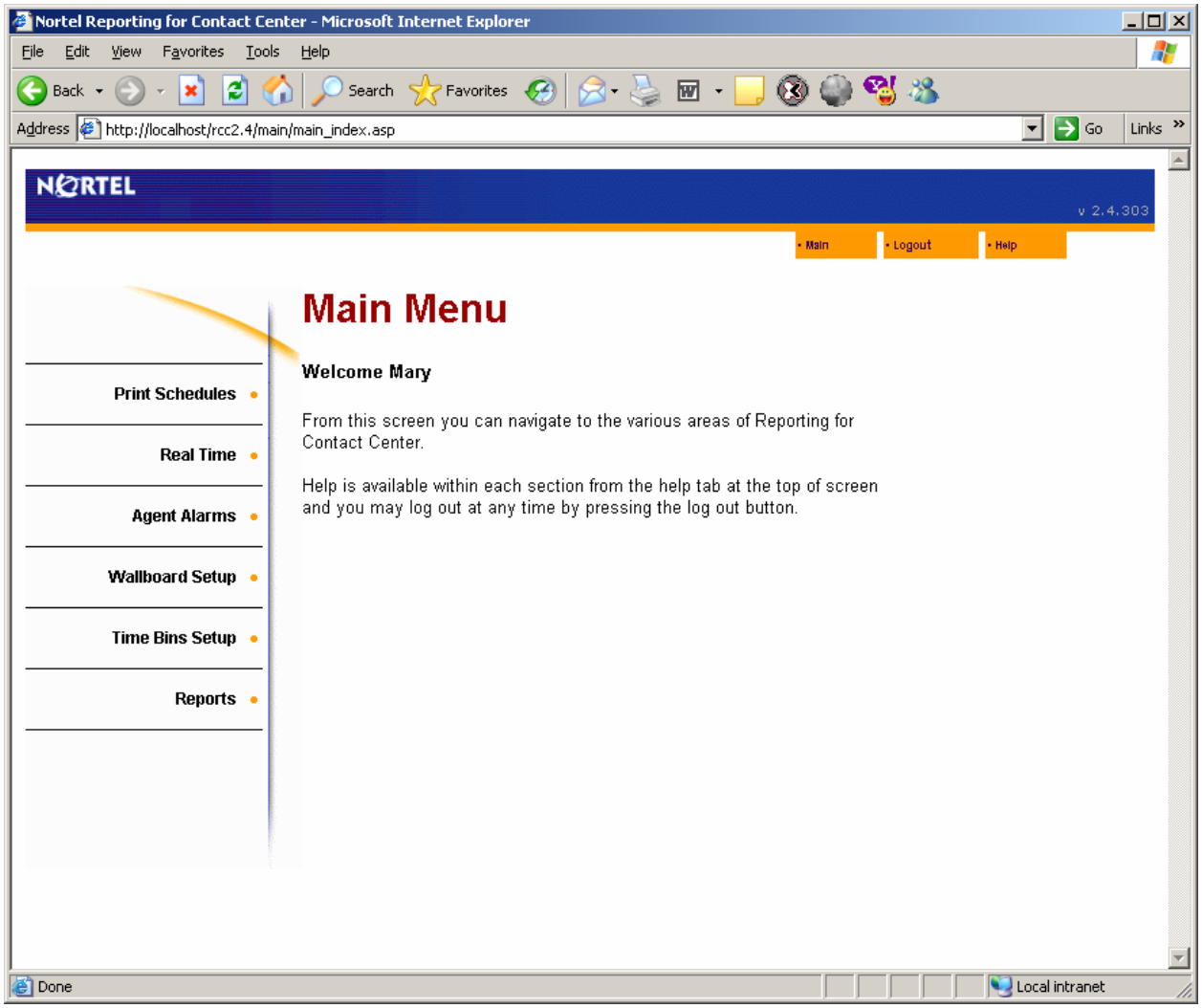


Figure 69: User Main Menu page

The page shown in Figure 69: User Main Menu page is the Main Menu for all non-Administrative Users. Note that the word **Administration** is not displayed in the blue bar at the top of each page.

Also note that Nortel Reporting for Contact Center recognizes who logs on and greets the User accordingly. In the example shown in Figure 69: User Main Menu page, User Mary Smith logged on, and the page displays the message “Welcome Mary”.

The options available to Users appear in the navigation pane on the left of the Main Menu page.

The options are as follows:

- Print Schedules
- Real Time
- Agent Alarms
- Wallboard Setup
- Time Bins Setup
- Reports

Print Schedules

You can configure Print Schedules so that Nortel Reporting for Contact Center automatically prints a set of requested reports at a specified time. You can specify Print Schedules to print Daily, Weekly, or Monthly reports.

You can configure multiple Daily, Weekly, and Monthly Schedules.

For example, you may wish to print a set of reports each day before you arrive at your desk. In this case, you configure a Daily Schedule which prints at, for example, 08:00.
You can also have a different Daily Schedule report that refers to Agent Activity. You can configure Nortel Reporting for Contact Center to print these reports at, for example, 16:30 so that you can review the reports before the end of the day.

> Note: If the Web Host PC is powered off over the period in which the Schedule print is due to take place, the Schedule Print not produced. You can obtain the same reports by using the Reports options**.** For more information, refer to Reports.

> Note: If you select the Agent Audit Report, the Activity Code Report by Skillset, the Agent Activity Code Report by Agent**,** or the Activity Code Report by # of Pegs Reports to be included in your Print Schedule, you are prompted for the Agents and/or the Activity Codes you wish to include in these Reports. These steps are described on pages 176 (Agent Audit Report), 176 (Activity Code Report by Skillset), 176 (Activity Code Report by Agents) and 176 (Activity Code report by # of Pegs).

From the User Main Menu page shown in Figure 69: User Main Menu page, select **Print Schedules** to view the Print Schedules page shown in Figure 70: Print Schedules page. As shown in the figure, the Print Schedules options are as follows:

- Daily Schedules (see Daily Schedules)
- Weekly Schedules (see Weekly Schedules)
- Monthly Schedules (see Monthly Schedules)

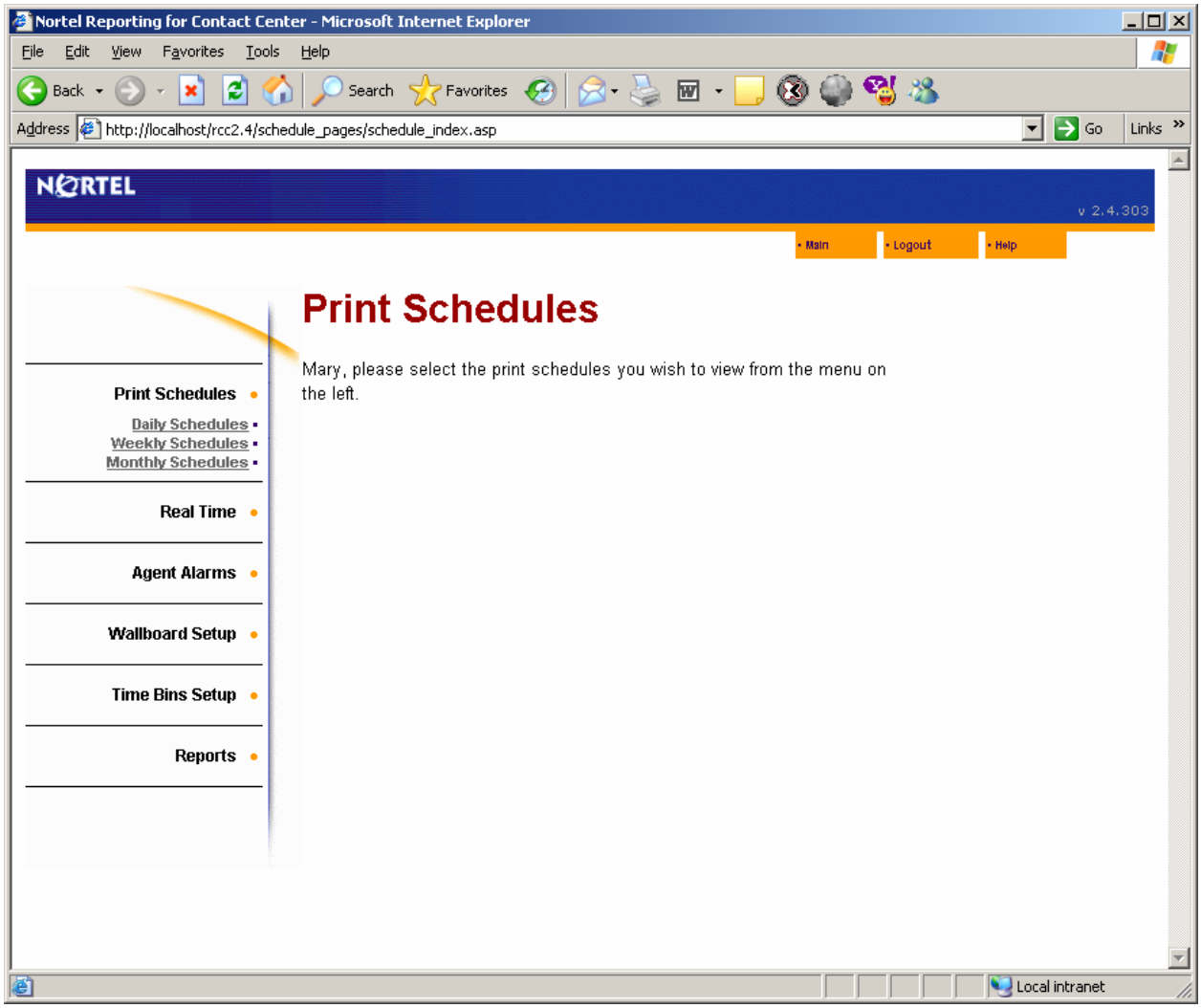


Figure 70: Print Schedules page

Daily Schedules

Select **Daily Schedules** to view the **Your Daily Schedules** page, shown in Figure 71: Your Daily Schedules page. Initially the page does not display any schedules.

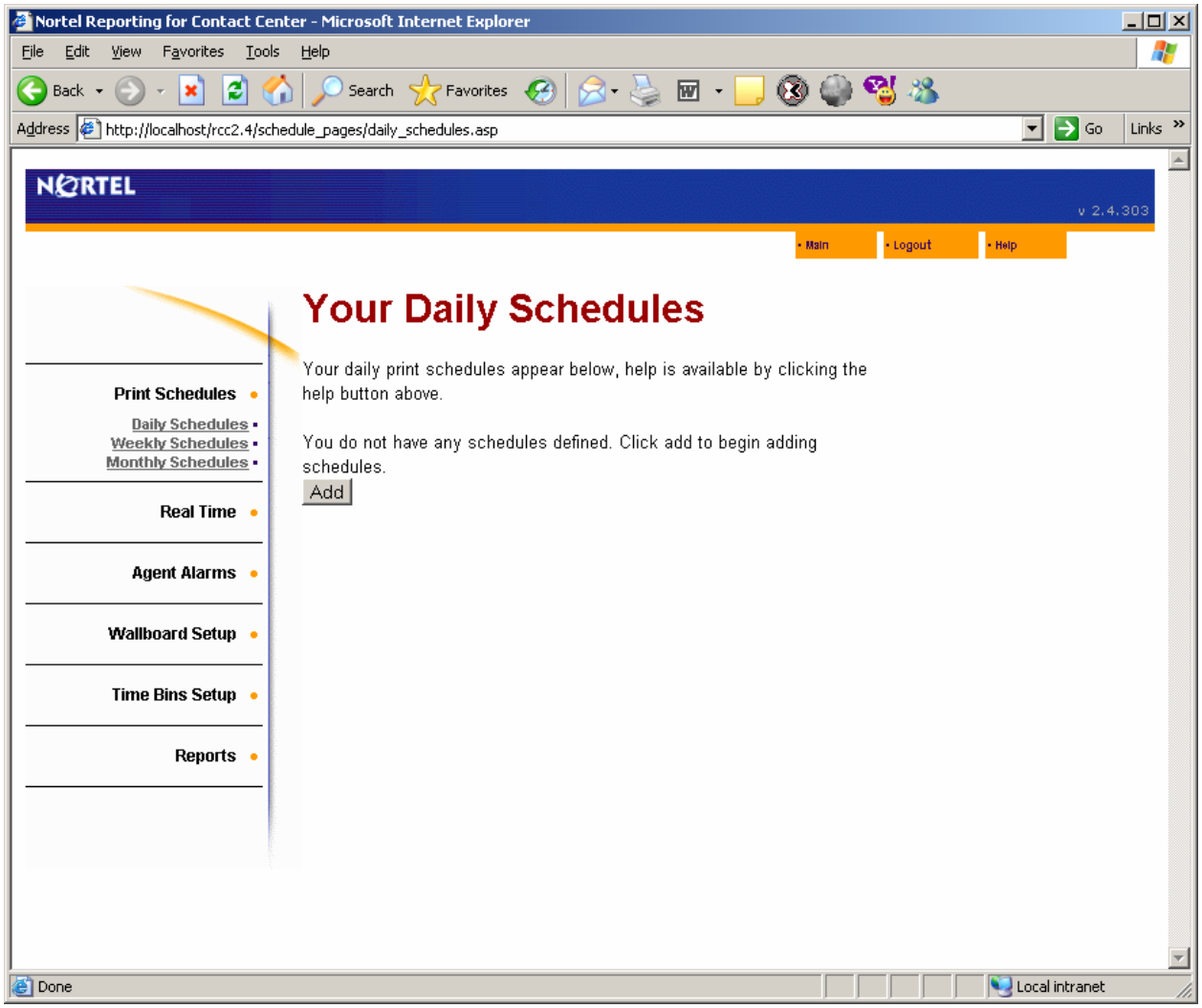


Figure 71: Your Daily Schedules page

Perform the following steps to add a Daily Schedule:

1. Click **Add**. The Add Daily Schedules page shown in Figure 72: Add Daily Schedule page appears.

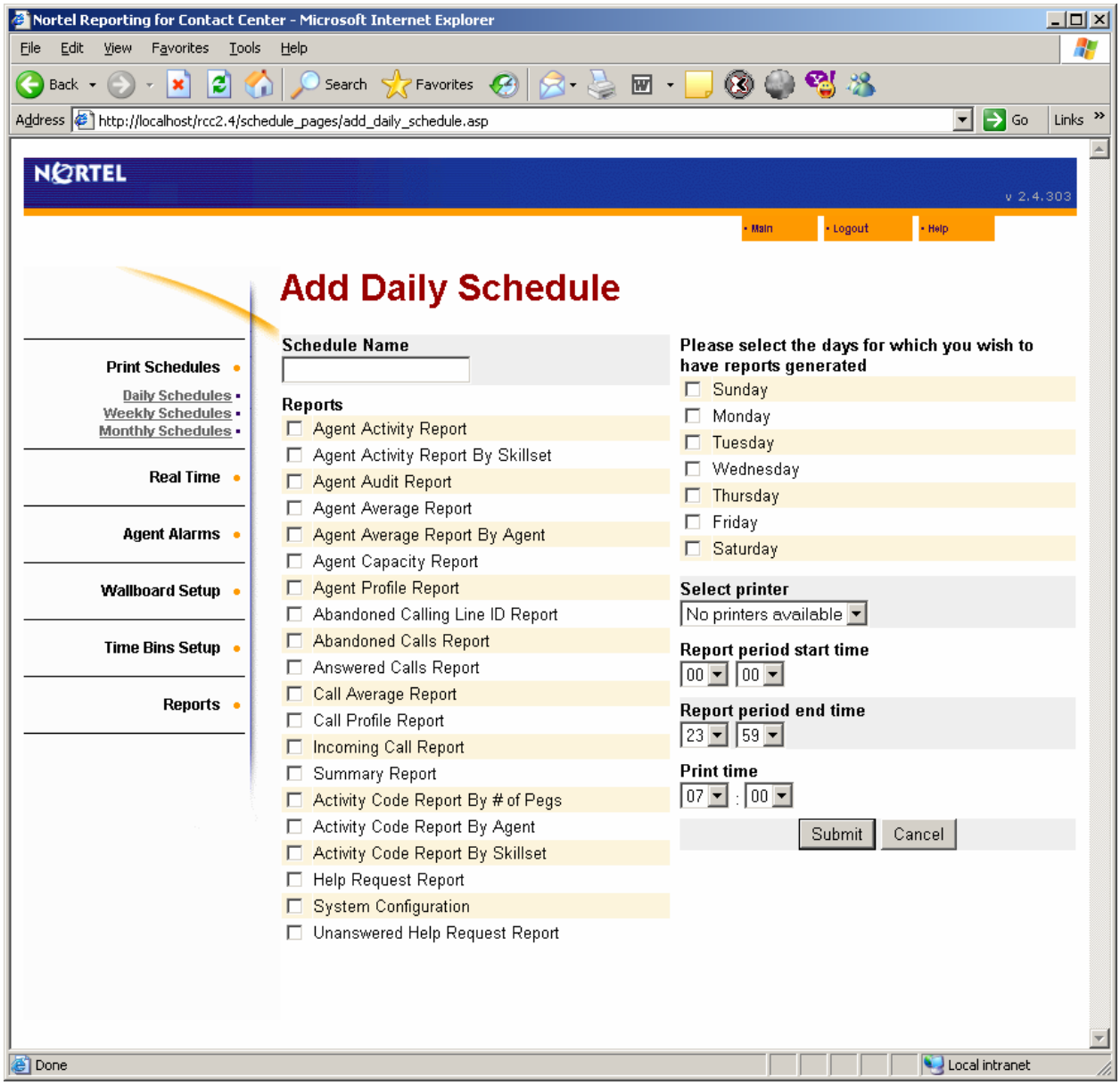


Figure 72: Add Daily Schedule page

The Add Daily Schedule page allows you to specify which reports you wish to have included in the Schedule, which days are to be included in the Schedule, and when to print the reports.

2. To set a name for your Schedule, type the name in the **Schedule Name** field. This is to help you identify, and distinguish between, the different Schedules you create.

3. To select a report to be included in the Schedule, select the check box beside the report name. Each selected report has a check mark in the check box beside its name. You can select multiple reports.

4. To include the reports from a particular day in the Schedule, select the check box beside that day. You can select multiple days.

Note: Daily Reports print on the day following the day which is being reported. That is, if you select a Daily Report Schedule for Monday, it prints on Tuesday. This ensures that the report day has completely elapsed when the reports are generated.

5. To specify which printer generates the reports, select a printer name from the **Select printer** list. This list includes all the printers that are accessible from the Web Host PC. (The reports are generated from the databases held in the Web Host PC.)

6. The **Report period start time** and **Report period end time** lists allow you to specify the period within each day for which the reports are generated. For example, if your Contact Center has a working day that starts at 08:30 and finishes at 17:30, you may wish to specify the Start Time as 08:00 (to see if you have early calls that you are missing by not having the Contact Center open) and 18:00 (to see if a late surge of calls occurs).

Figure 73: Add Daily Schedule page – example settings shows example settings that User Mary Smith configured for her Daily Schedule.

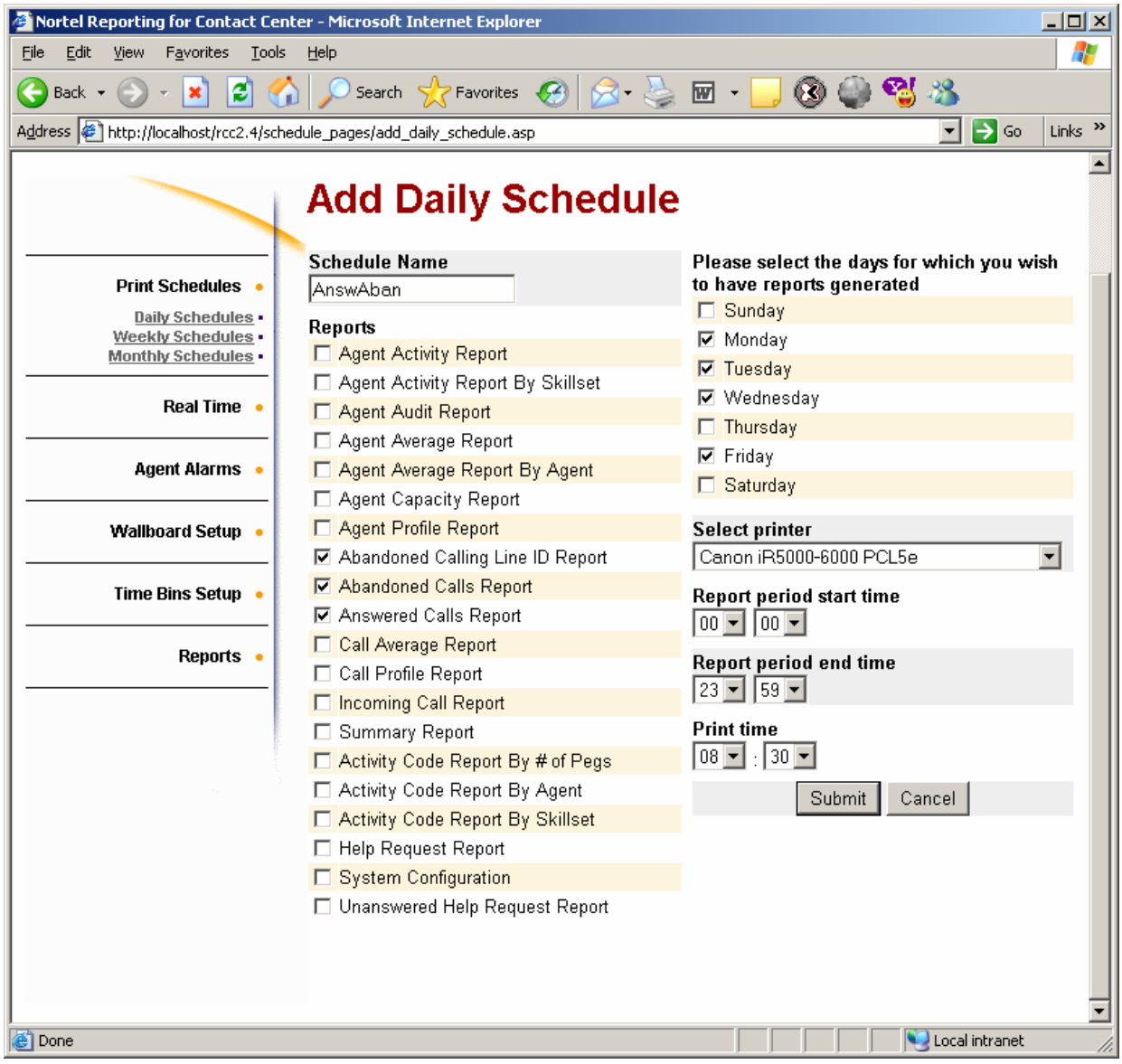


Figure 73: Add Daily Schedule page – example settings

Mary Smith selected the Answered Calls, Abandoned Calls and CLID reports to be printed at 08:30 each morning, for Monday through Friday. Her printouts will be generated on Tuesday for Monday, on Wednesday for Tuesday, and so on until Friday's reports are printed on Saturday morning.

Her schedule is called **AnswAban**, and the reports start to be generated at 08:30, on the Cannon iR5000-6000 PCL5e printer. The reports cover the period from midnight to midnight for each day.

7. To save your Daily Schedule, click **Submit**. The Daily Schedule Skillsets page, shown in Figure 74: Daily Schedule - Skillsets page appears.

   To close the Add Daily Schedule page without saving your changes, click **Cancel**. The Your Daily Schedules page shown in Figure 71: Your Daily Schedules page appears.

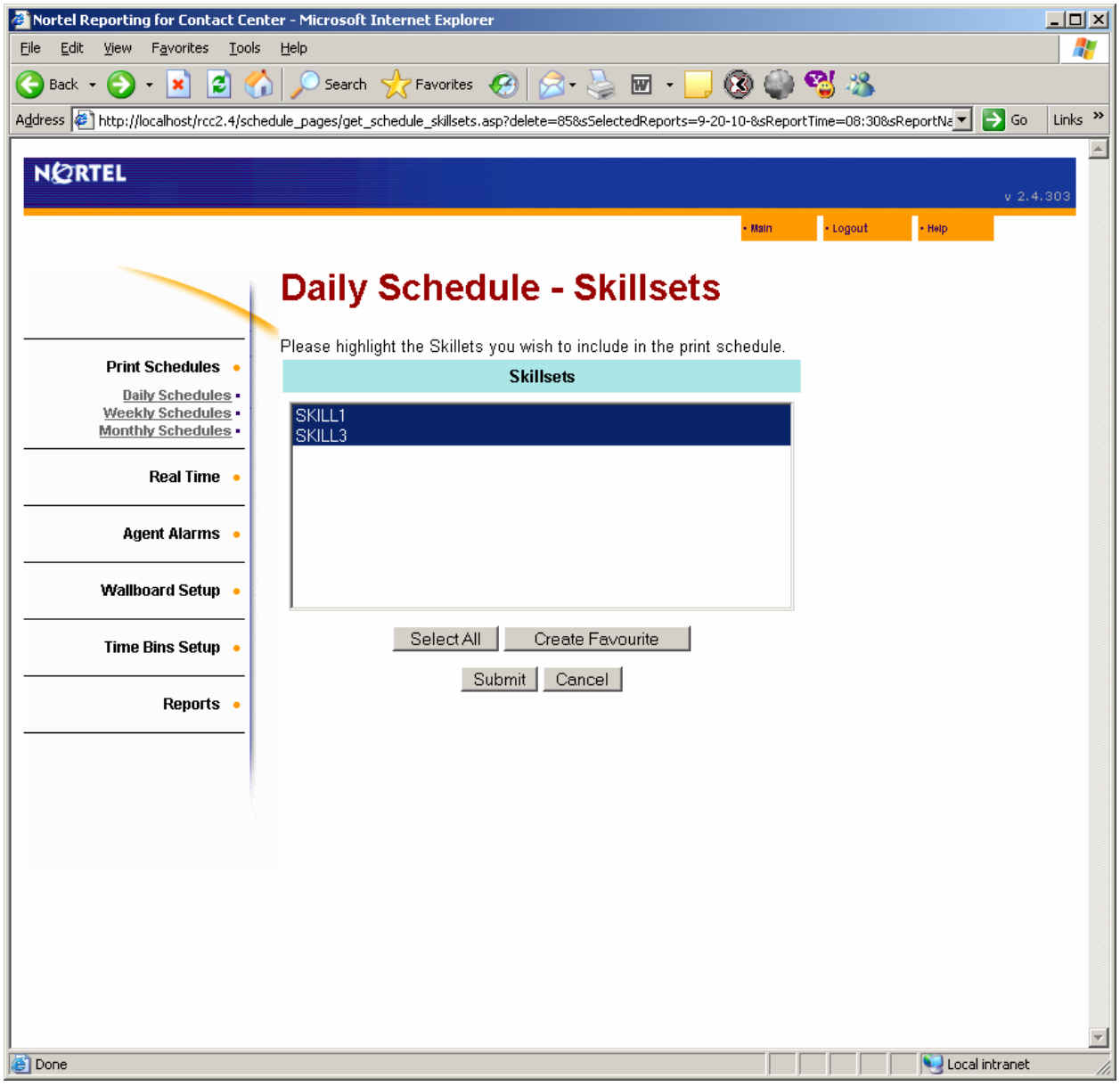


Figure 74: Daily Schedule - Skillsets page

The Daily Schedule Skillsets page allows you to select which Skillsets you wish to include in the generated reports that are produced by the Daily Schedule.

Skillset List Selection Methods

You can use the following techniques to select Skillsets from the Skillset List.

- Click an unselected Skillset name once to select it (it will be highlighted) and remove the highlight from any other currently selected Skillsets.
- Click a selected (highlighted) Skillset name once to unselect it. Note that if other Skillsets are selected and you click a Skillset name, you unselect all the other Skillsets.
- To select multiple Skillsets, press **Ctrl** and click on multiple Skillsets.
- Press and hold down the Shift key, then click a Skillset to select all the Skillsets between the currently highlighted Skillset and the Skillset you clicked.
- You can use **Select All** to select all the Skillsets at once.

Adding Selections to the Favorites List

If there are collections of the assigned Skillset for which you frequently need to review the Daily Schedules, you can add the selection of Skillsets to the Favorites list.

When you add the selection to the Favorites list, instead of having to select a particular collection of Skillsets each time you wish to use them, you can click **Select** beside the appropriate Favorite, and the collection of Skillsets is highlighted at once. You do not need to select a particular collection of Skillsets each time you wish to use them.

Follow these steps to add a Favorite to the Favorite List:

1. Select the Skillsets you wish to include in the Favorite List and then click **Create Favorite**. The Save Favorites page appears, as shown in Figure 75: Save Favourites page.

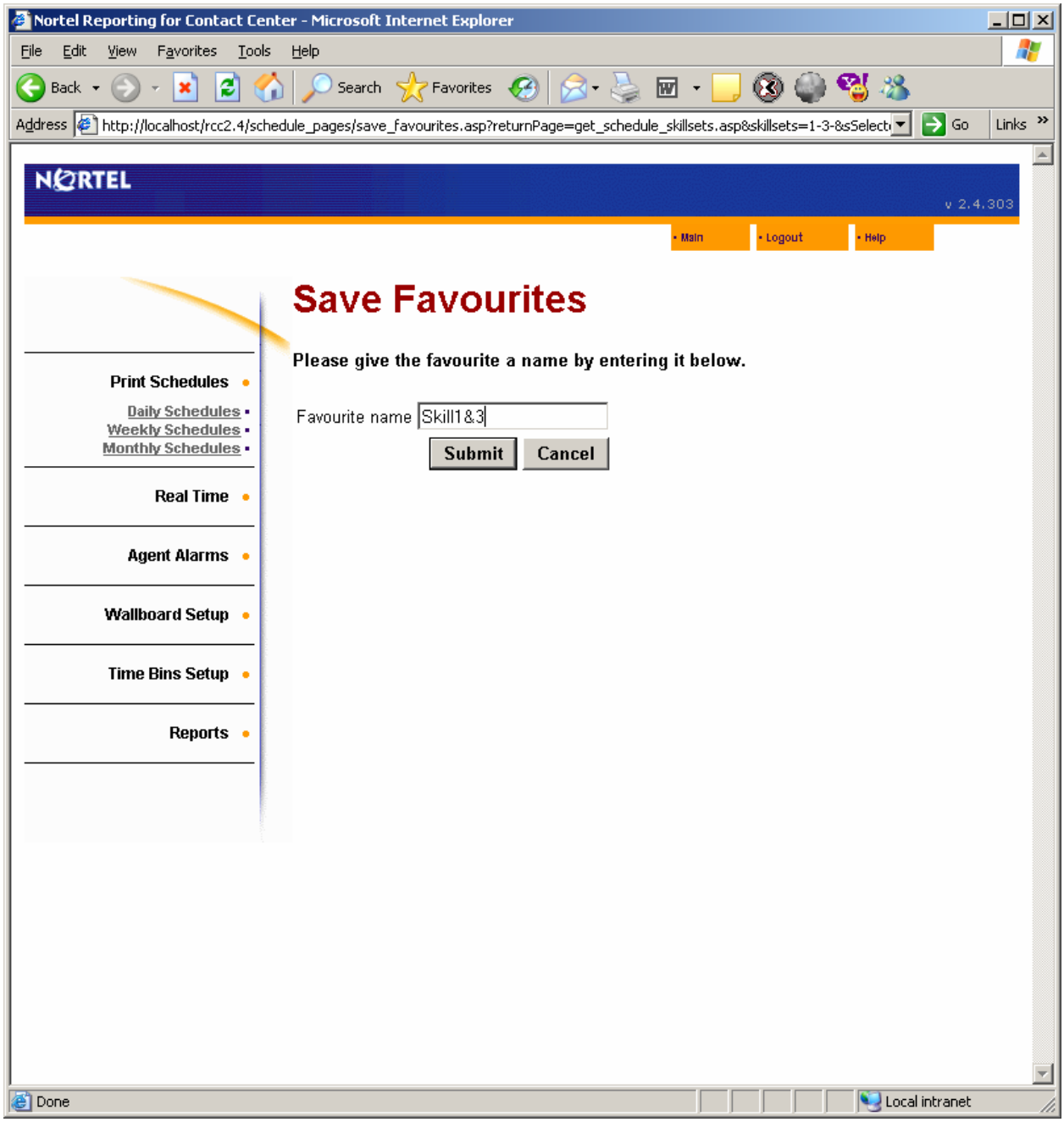


Figure 75: Save Favourites page

2. Enter a name in the **Favorite Name** field, and then click **Submit** to save the name. (Click **Cancel** to return without saving the Favorite.)

   In the example shown in Figure 75: Save Favourites page, Mary Smith created a favorite that contains the Skillsets SKILL1 and SKILL3 called “Skill1&3”. When a Favorite is created, it appears in the Favorite List at the top of the page.

   Note: Many pages within Nortel Reporting for Contact Center allow you to use S lists and Favorites, and the techniques described here apply also to all those other pages. All

the Favorites you create are accessible from any point within Nortel Reporting for Contact Center that allows you to use Favorites.

Mary Smith clicked Select beside her new Favorite (Skill1&3), and the two associated Skillsets are selected for her.

Saving your Daily Schedule

1. To save your Daily Schedule, click **Submit**. The Your Daily Schedules page shown in Figure 76: Your Daily Schedules with a Schedule in the List appears. The page shows the Daily Schedule that you created.

   To leave the Daily Schedule Skillsets page without saving any changes, click **Cancel**. The Your Daily Schedules page appears. See Figure 71: Your Daily Schedules page.

   Note: If you included the Agent Audit Report, the Activity Code Report by Skillset, Agent Activity Code Report by Agent, or the Activity Code Report by # of Pegs Reports in your Print Schedule, you are prompted for the Agents and/or the Activity Codes you wish to include in these Reports. These steps are described on pages 176 (Agent Audit Report), 176 (Activity Code Report by Skillset), 176 (Activity Code Report by Agents) and 176 (Activity Code report by # of Pegs).

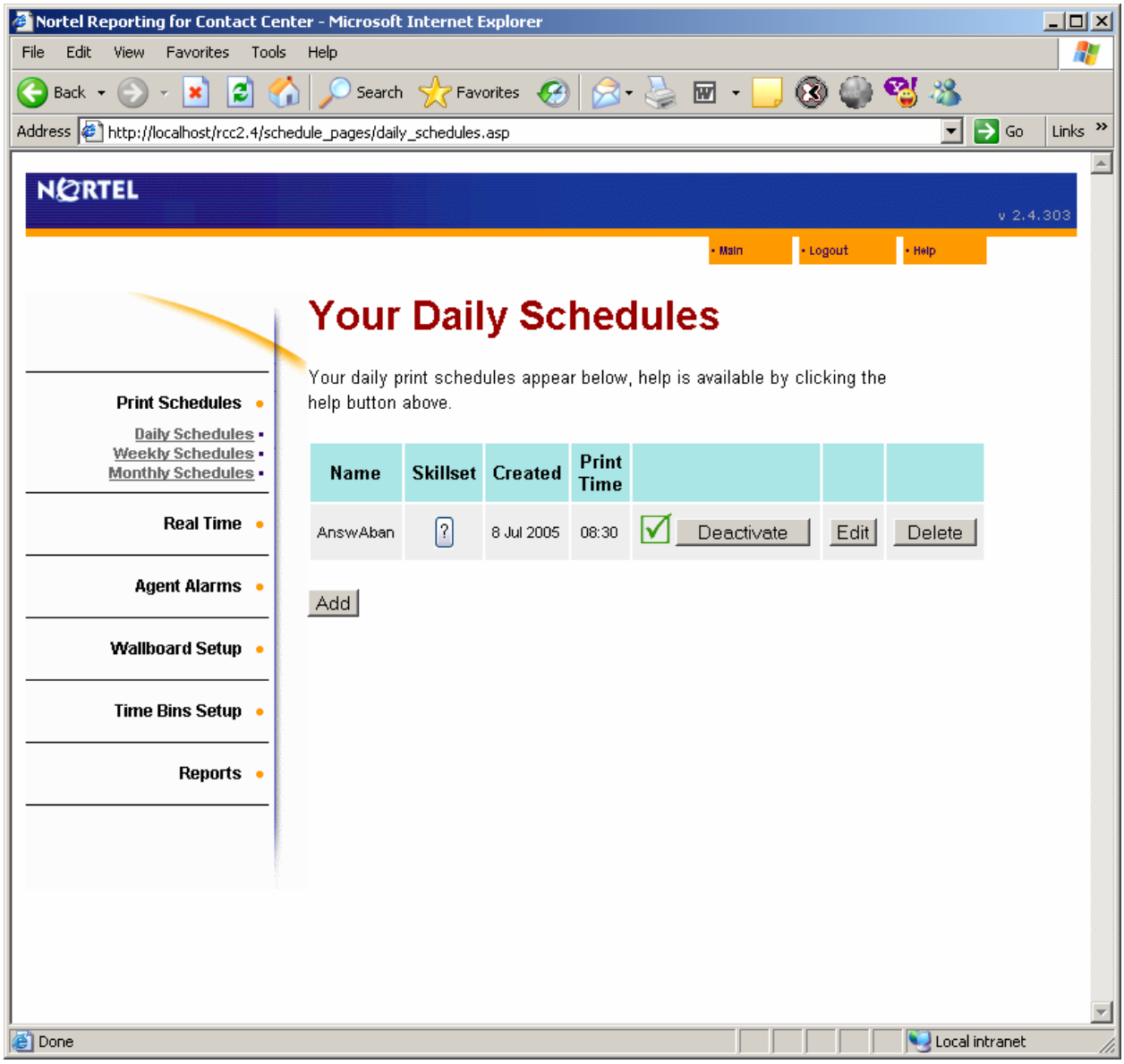


Figure 76: Your Daily Schedules with a Schedule in the List

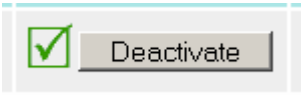
Note that each Schedule can be identified by the Schedule Name that was provided when the Schedule was created.

Deactivate

Click **Deactivate** to disable the Print Schedule so that the schedule is no longer printed when the schedule is due to run. When a schedule is disabled, the button changes from Deactivate to Activate, and a red cross replaces the green check mark, similar to the following illustration.

Activate

Click **Activate** to enable the Print Schedule so that the schedule is printed when the schedule is due to run. Once a schedule is enabled, the button changes from Activate to Deactivate and a green check mark replaces the red cross, similar to the following illustration.



Edit

Click **Edit** to change the settings for a Schedule.
The Edit Daily Schedule page, shown in Figure 77: Edit Daily Schedule page appears.

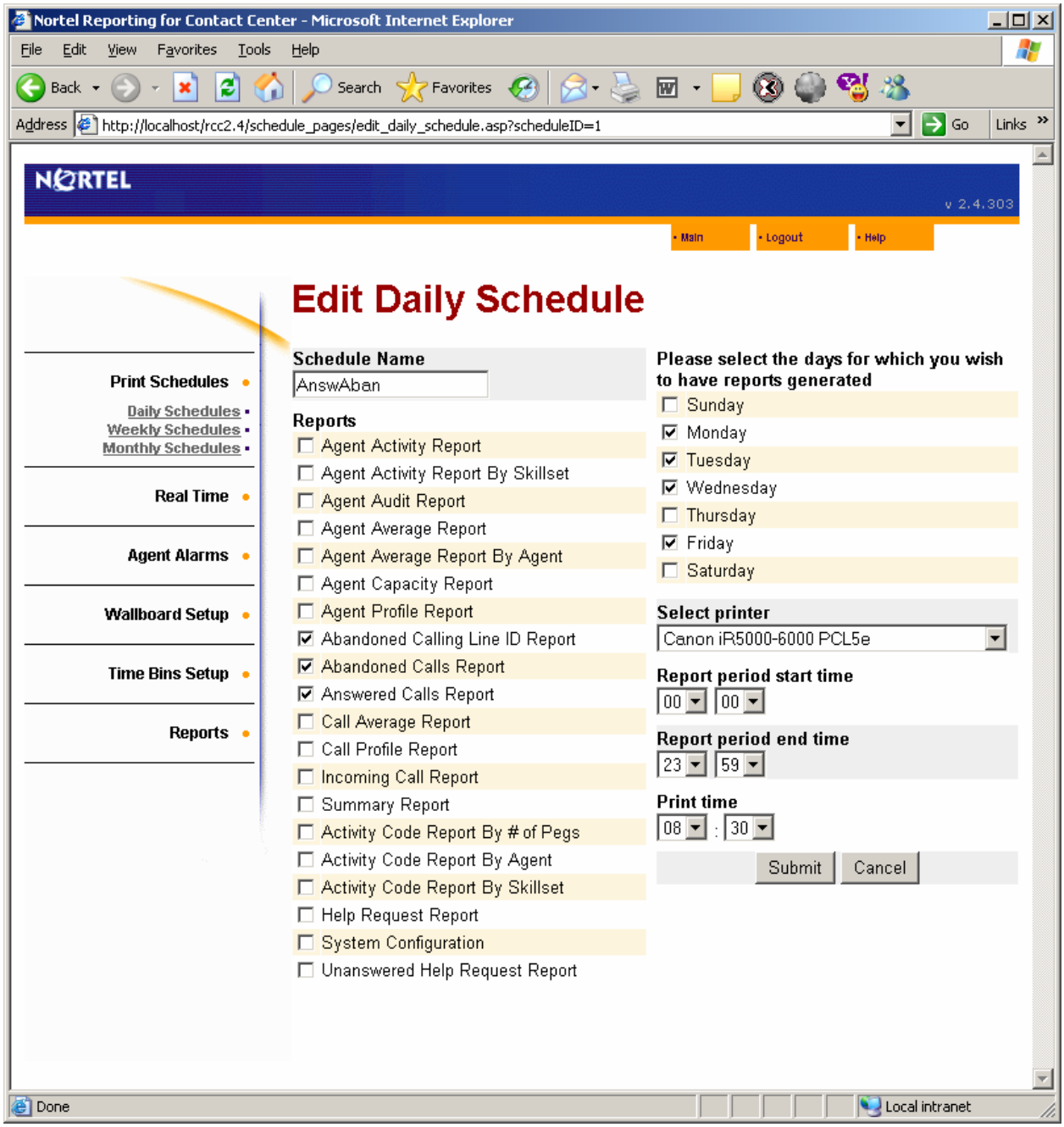


Figure 77: Edit Daily Schedule page

This page is set up exactly like the Add Daily Schedule page, except the fields and check boxes are populated with the settings of the Schedule you are editing. In the example, you are editing the AnswAban schedule. Make any necessary changes and click **Submit**. Your Daily Schedules page appears. See Figure 76: Your Daily Schedules with a Schedule in the List

To leave the Edit Daily Schedule page without saving any changes, click **Cancel**. The Your Daily Schedules page appears. See Figure 76: Your Daily Schedules with a Schedule in the List.

Delete

Click **Delete** to remove the Schedule from the system and to remove its listing from the Your Daily Schedules page.

You are prompted to confirm the deletion. When you confirm the deletion, the Your Daily Schedules page appears.

Weekly Schedules

On the Print Schedules page shown in Figure 70: Print Schedules page, select **Weekly Schedules** to view the Your Weekly Schedules page. See Figure 78: Your Weekly Schedules page. Initially, the page does not show any schedules.

The Add Weekly Schedule page allows you to specify which reports you wish to include in the Schedule and when to print the scheduled reports.

You can also specify which period of the day the reports contain. You must specify a name for your Schedule and the printer on which you wish to generate the reports.

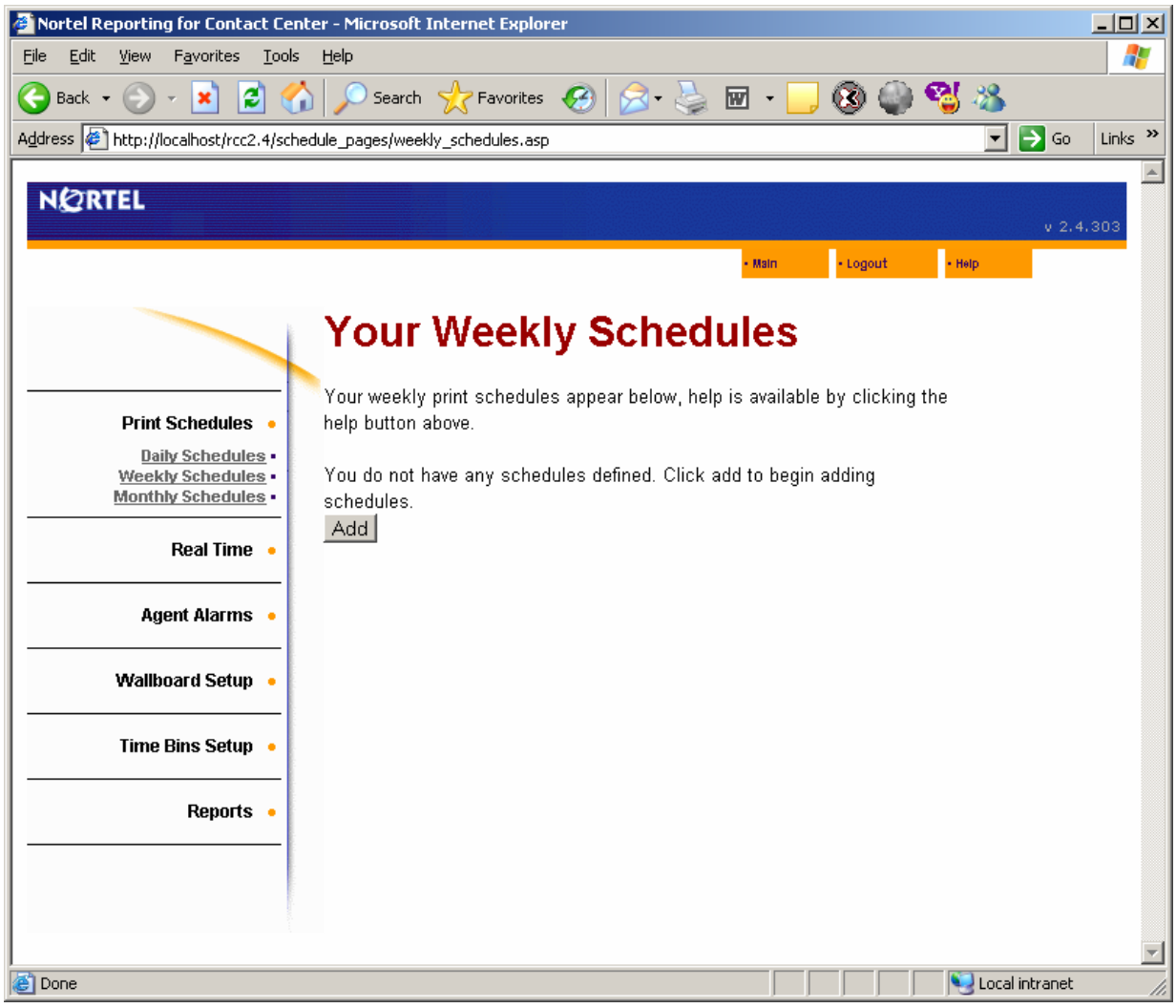


Figure 78: Your Weekly Schedules page

Perform the following steps to add a Weekly Schedule:

1. Click **Add**. The Add Weekly Schedules page shown in Figure 79: Add Weekly Schedule page appears.

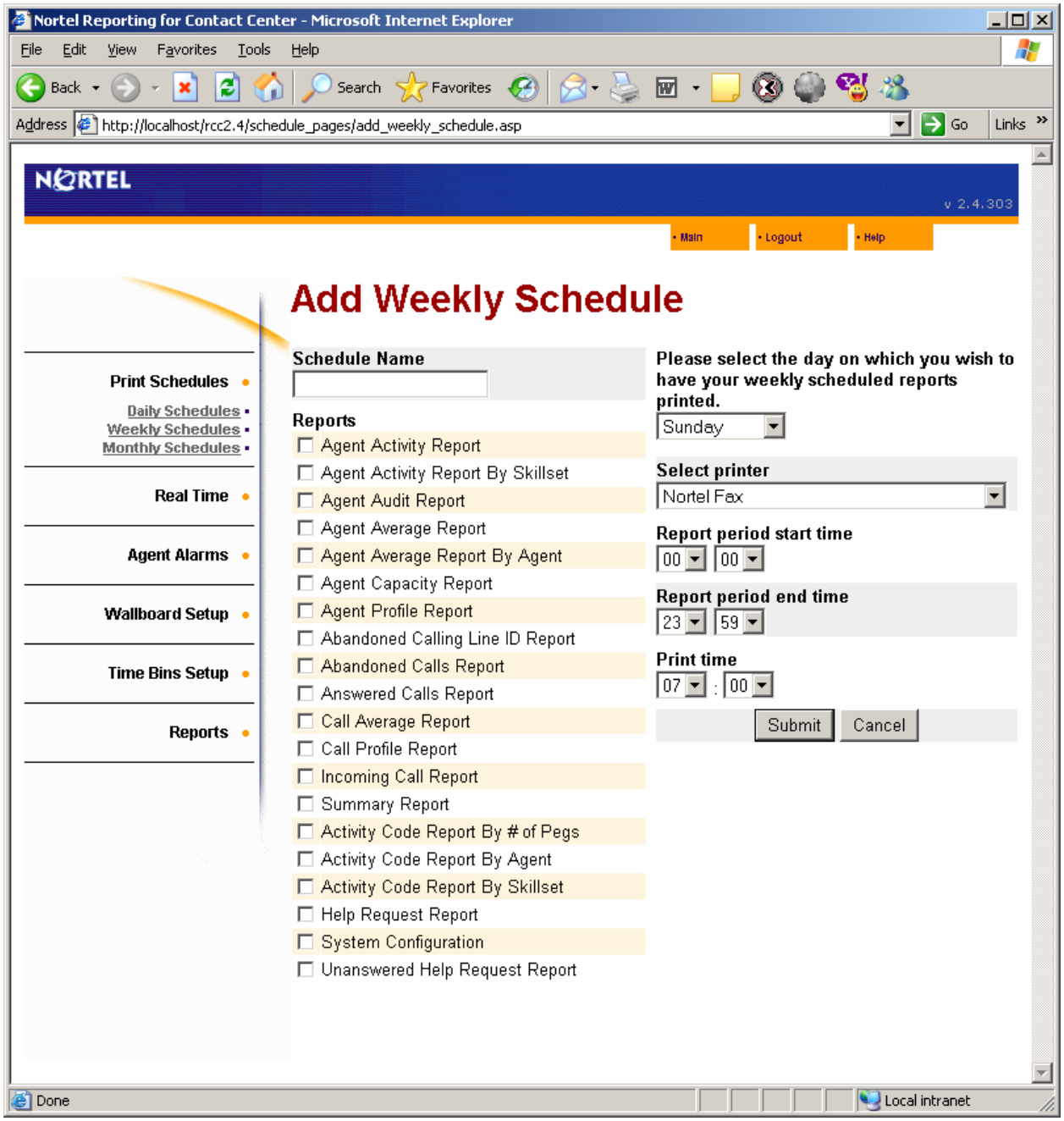


Figure 79: Add Weekly Schedule page

2. To set a name for your Schedule, enter the name in the **Schedule Name** field. The name helps you identify and distinguish between the different Schedules you create.

3. To select a report to include in the Schedule, click the check box beside the report name. Selected reports have a check mark in the check box beside their name. You can select multiple reports.

4. The reports are generated for a calendar week. From the list, select the day on which the Weekly Schedule reports are generated.

   Note: Weekly Schedules generate reports on the specified day at the specified time. However, the generated reports contain information from the previous calendar week. For example, a User creates a Weekly Schedule to print on a Saturday. They create this Schedule on September 10th, 2003. See Figure 80: Calendar for September 2003. On Saturday September 13, the Weekly Schedule generates Weekly reports. These Reports contain information relating to the week September 1st –September 7th. Reports containing the information relating to the week September 8th – September 14th are printed on Saturday, 20 September, and so on.

September 2003

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Figure 80: Calendar for September 2003

5. In the **Select printer** list, select the printer on which the reports will be generated. This list includes all the printers that are accessible from the Web Host PC. (The reports are generated from the databases held in the Web Host PC.)

6. In the **Report period start time** and **Report period end time** fields, specify the period in each day for which the reports are generated. For example, if your Contact Center has a working day that starts at 08:30 and finishes at 17:30, you may wish to specify the Start Time as 08:00 (to see if you have early calls that you are missing by not having the Contact Center open) and 18:00 (to see if there is a late surge of calls).

Figure 81: Add Weekly Schedule page – example schedule shows how User Mary Smith configured her Weekly Schedule.

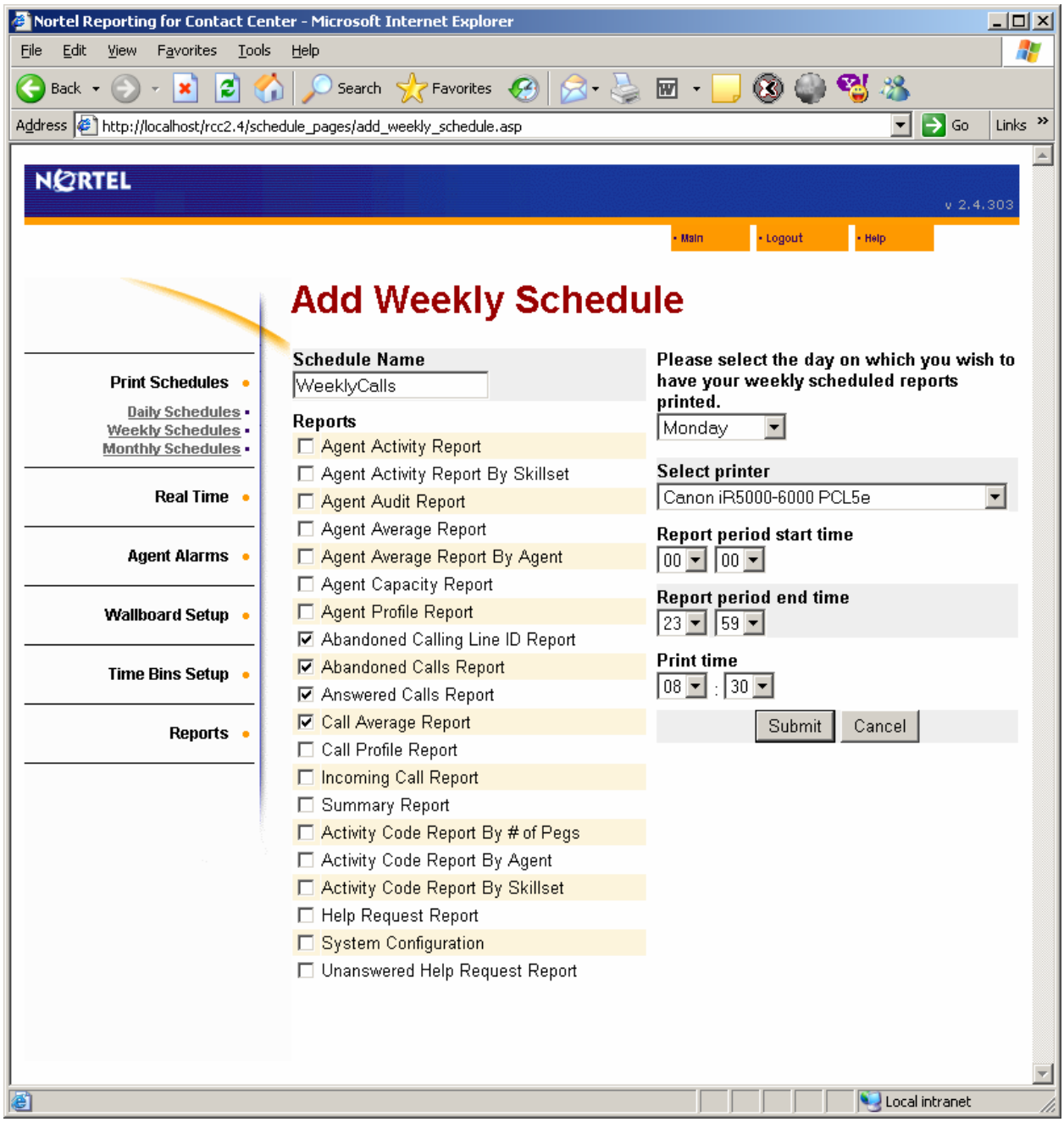


Figure 81: Add Weekly Schedule page – example schedule

Mary Smith selected the Answered Calls, Abandoned Calls, CLID, and Call Average reports to be printed at 08:30 on Mondays.

Her schedule is called **WeeklyCalls**. The reports start generating at 08:30 on the Canon iR5000-6000 PCL5e printer. The reports cover the period from midnight to midnight for each day.

7. Click **Submit** to save your Weekly Schedule. The Weekly Schedules – Skillsets page shown in Figure 82: Weekly Schedules - Skillsets appears.

Weekly Schedules Skillsets

The Weekly Schedule - Skillsets page allows you to select which Skillsets you wish to include in the generated reports that the Weekly Schedule produces.

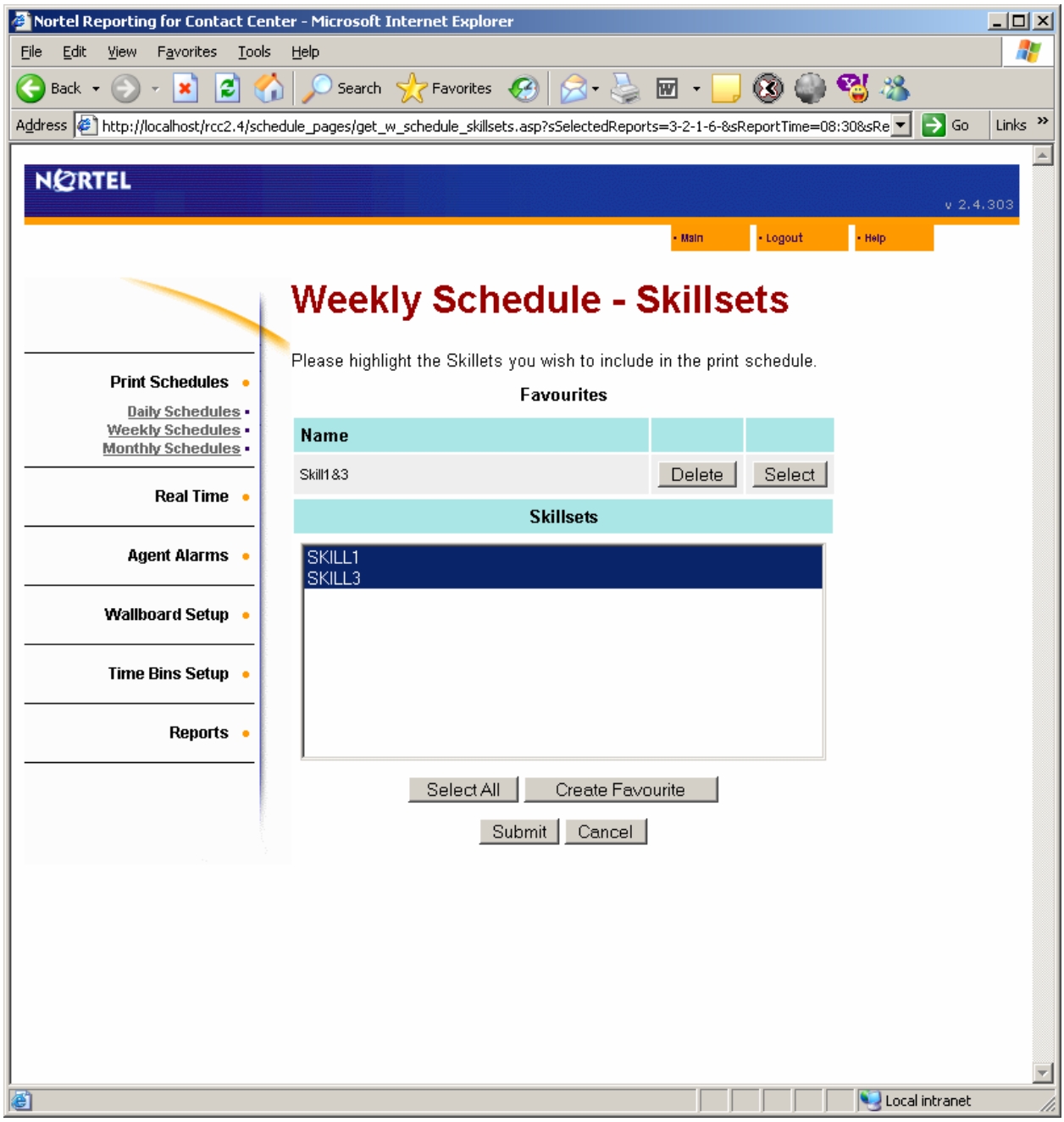


Figure 82: Weekly Schedules - Skillsets

- For information about using Skillset selection lists, see page 92.
- For information about using Favorites, see page 92.

In the example shown in Figure 82: Weekly Schedules - Skillsets, User Mary Smith used her Skill1&3 Favorite to select the Development and Training Skillsets.

To save your Weekly Schedule Skillsets selections, click **Submit**. The Your Weekly Schedules page appears.

To leave the Weekly Schedule – Skillsets page without saving any changes, click **Cancel**. The Your Weekly Schedules page appears.

Saving Your Weekly Schedule

To save your Weekly Schedule, click **Submit**. The Your Weekly Schedules page shown in Figure 83: Your Weekly Schedules page with a Schedule in the list appears. The page shows the schedule you created. In the example, the schedule name is Weekly Calls.

To leave the Add Weekly Schedule page without saving any changes, click **Cancel**. You are prompted to confirm that you do not wish to save your changes. After you confirm the deletion, the Your Weekly Schedules page appears. See Figure 78: Your Weekly Schedules page.

> **Note**: If you include the Agent Audit Report, the Activity Code Report by Skillset, Agent Activity Code Report by Agent, or the Activity Code Report by # of Pegs Reports in your Print Schedule, you are prompted for the Agents and/or the Activity Codes you wish to include with these Reports. These steps are described on pages 176 (Agent Audit Report), 176 (Activity Code Report by Skillset), 176 (Activity Code Report by Agents) and 176 (Activity Code report by # of Pegs).

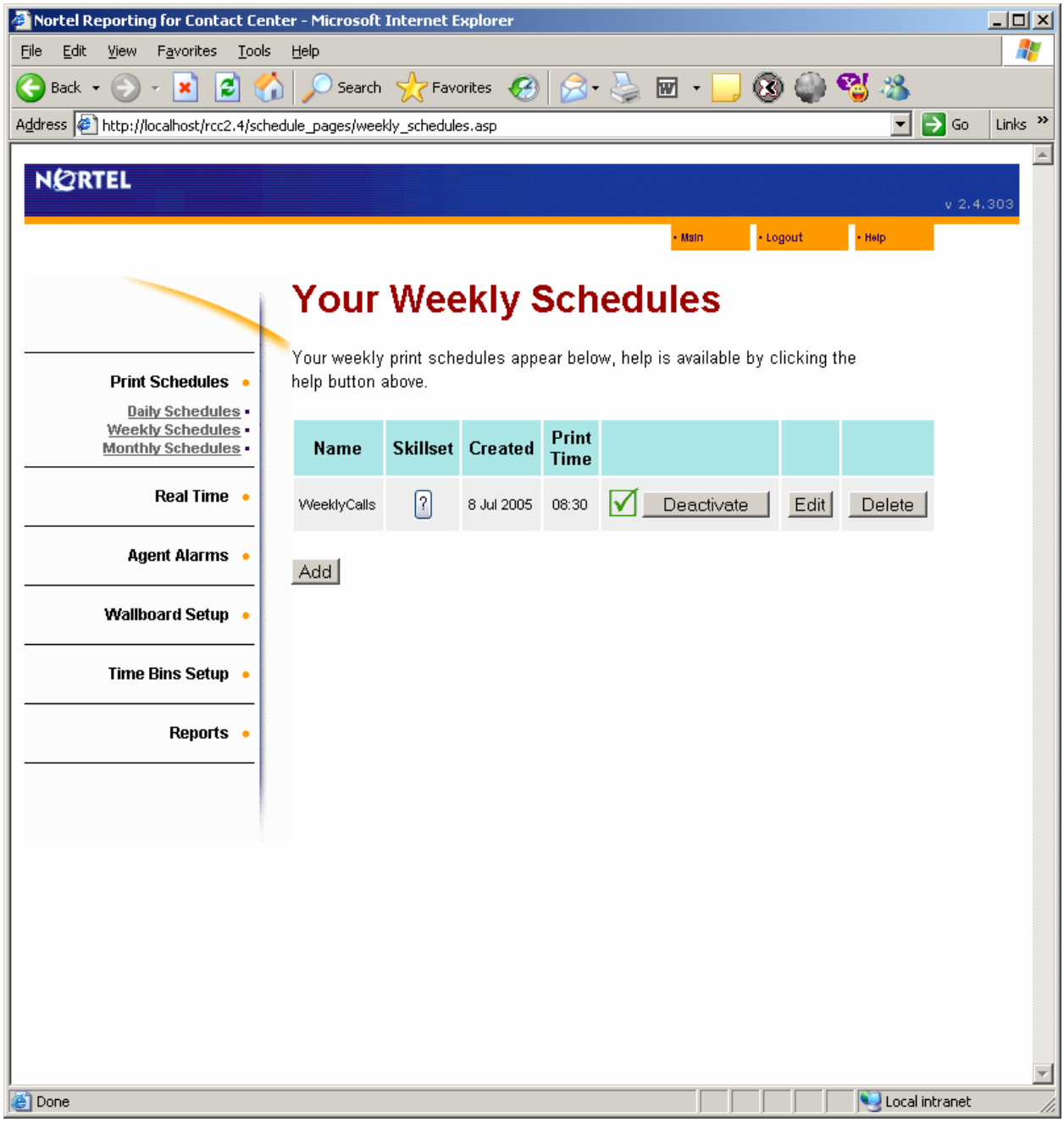


Figure 83: Your Weekly Schedules page with a Schedule in the list

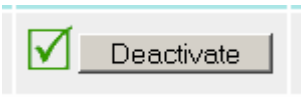
Note that each Schedule can be identified by the Schedule Name that was provided earlier when the Schedule was created.

Deactivate

Click **Deactivate** to disable the Print Schedule so that the schedule no longer prints when the schedule is due to run. When a schedule is disabled, the Deactivate button changes from Deactivate to Activate and a red cross replaces the green check mark, similar to the following illustration.

Activate

Click **Activate** to enable the Print Schedule so that the schedule prints when the schedule is due to run. When a schedule is enabled, the Activate button changes from Activate to Deactivate and a green check mark replaces the red cross, similar to the following illustration.



Edit

Click **Edit** to view the Edit Weekly Schedule page, shown in Figure 84: Edit Weekly Schedule page.

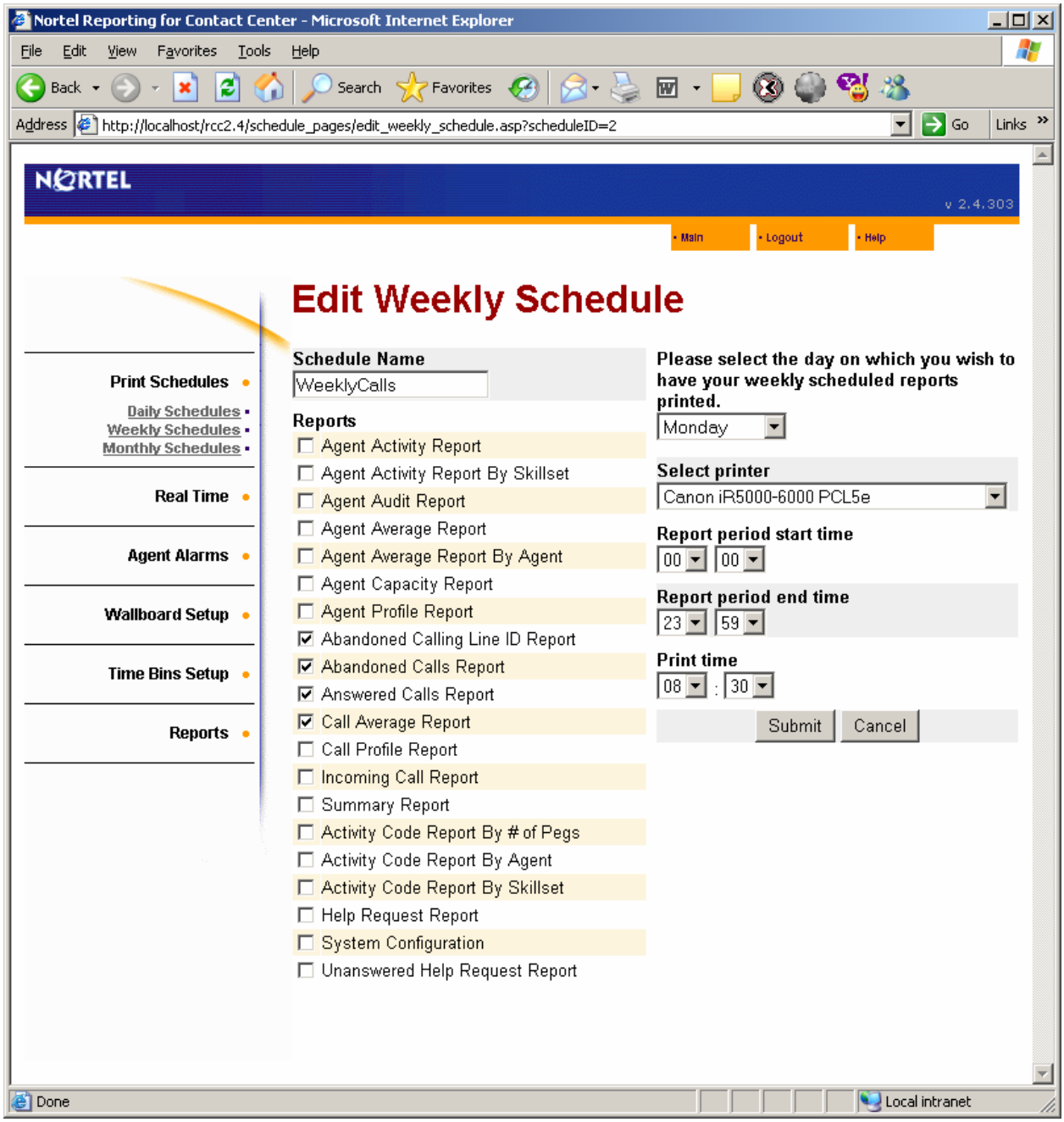


Figure 84: Edit Weekly Schedule page

This page is set up exactly like the Add Weekly Schedule page, except the fields and check boxes are populated with the settings of the Schedule you are editing. In the example, you are editing the Weekly Calls schedule. Make any necessary changes and click **Submit**. The Your Weekly Schedules page shown in Figure 78: Your Weekly Schedules page appears.

To leave the Edit Weekly Schedule page without saving any changes, click **Cancel**. The Your Weekly Schedules page shown in Figure 78: Your Weekly Schedules page appears.

Delete

Click **Delete** to remove the Schedule from the system and remove its listing from the Your Weekly Schedules page.

You are prompted to confirm the deletion. When you confirm the deletion, the Your Weekly Schedules page shown in Figure 78: Your Weekly Schedules page appears.

Monthly Schedules

On the Print Schedules page shown in Figure 70: Print Schedules page, select **Monthly Schedules** to view the Your Monthly Schedules page. See Figure 85: Your Monthly Schedules page. Initially, the page does not show any schedules.

The Add Monthly Schedule page allows you to specify which reports you wish to include in the Schedule and when to print the scheduled reports.

You can also specify which period of the day the reports contain. You must specify a name for your Schedule and the printer on which you wish to generate the reports.

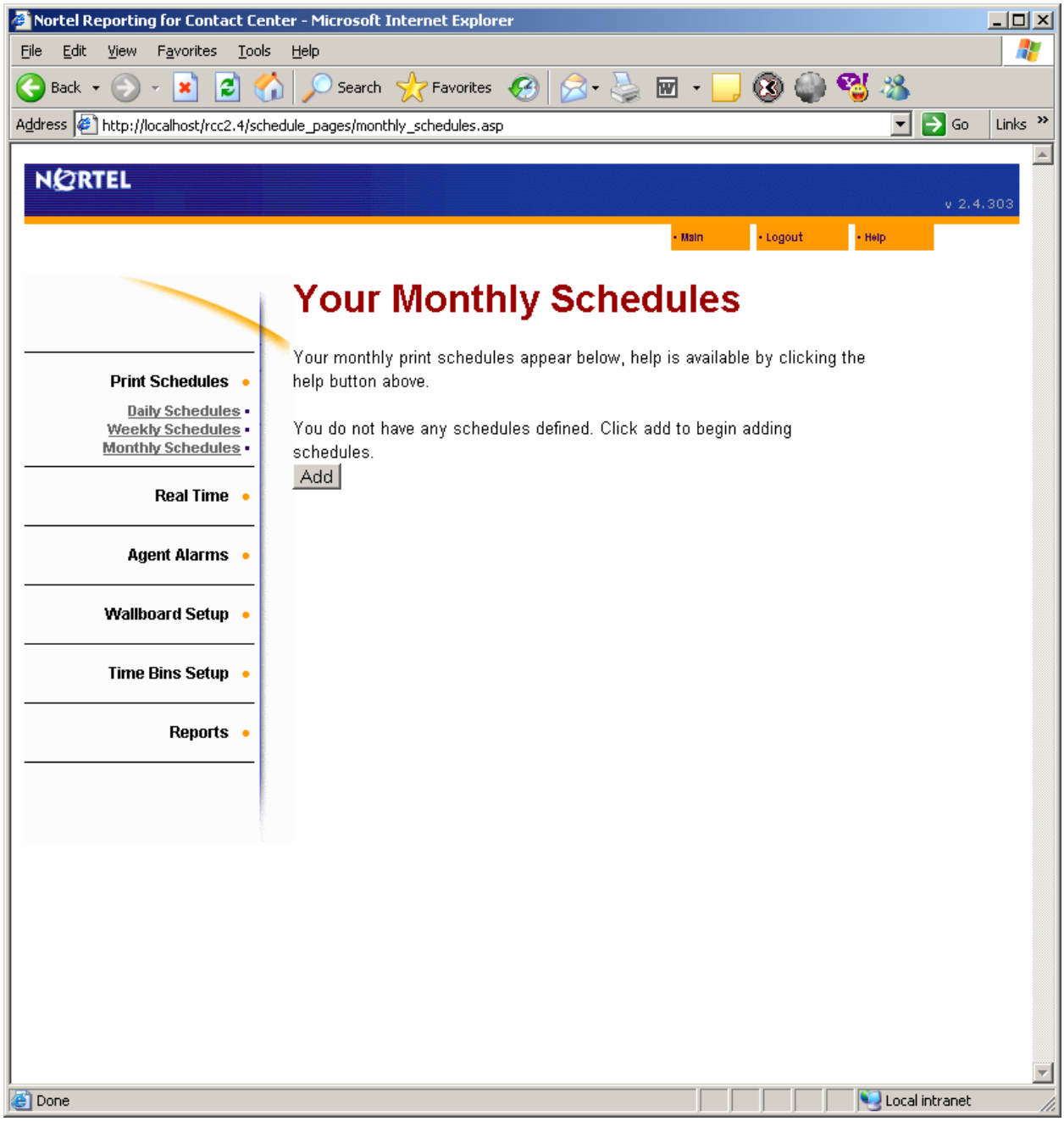


Figure 85: Your Monthly Schedules page

Perform the following steps to add a Monthly Schedule:

1. Click **Add**. The Add Monthly Schedules page shown in Figure 86: Add Monthly Schedule page appears.

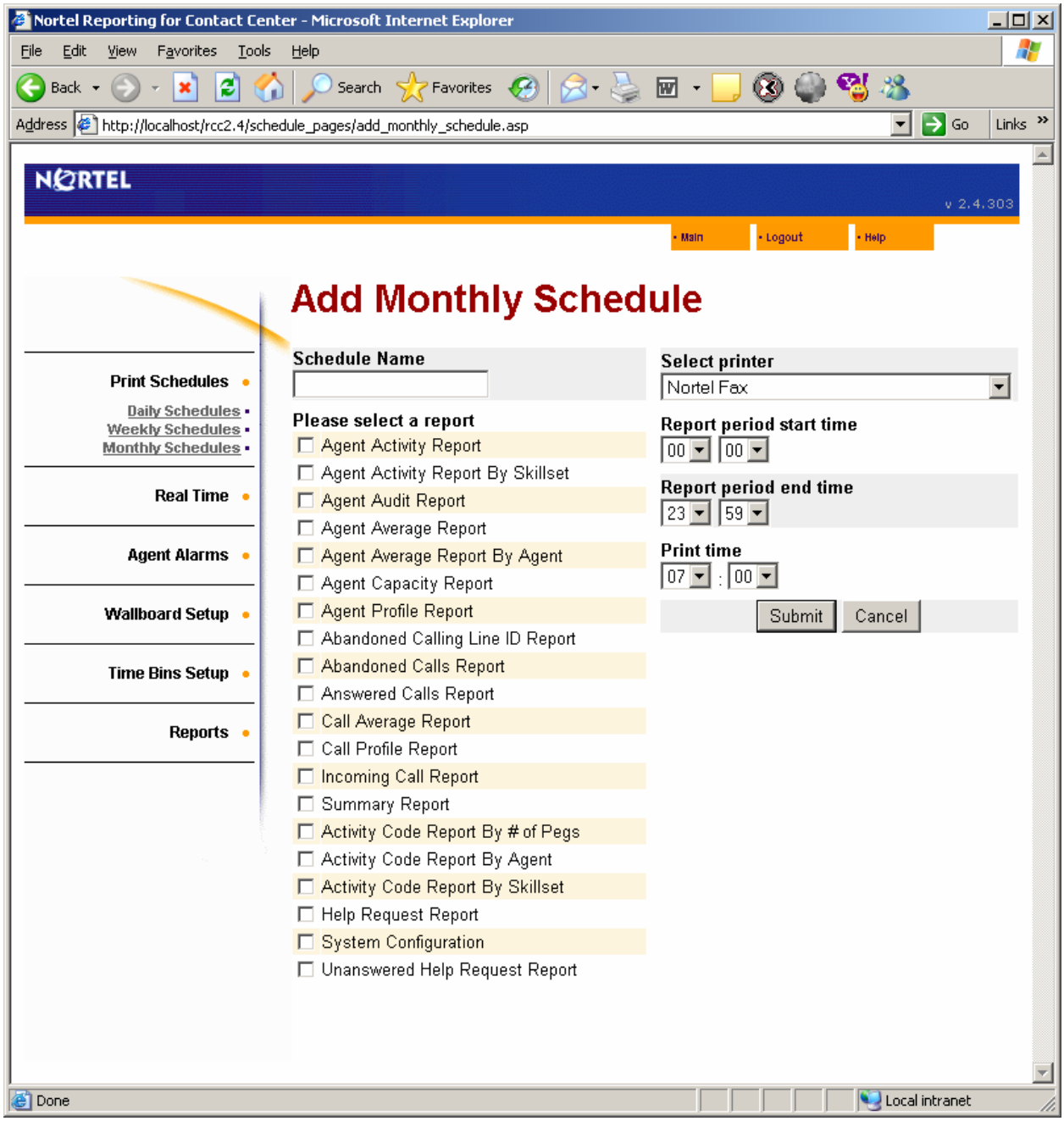


Figure 86: Add Monthly Schedule page

2. To set a name for your Schedule, enter the name in the **Schedule Name** field. This name helps you identify and distinguish between the different Schedules you create.
3. To select a report to include in the Schedule, select the check box beside the report name. You can select multiple reports.

4. To specify the printer on which the reports are generated, select a printer from the **Select printer** list. The list includes all the printers that are accessible from the Web Host PC. (The reports are generated from the databases held in the Web Host PC.)

5. The reports are generated for a calendar month. You must specify the time you wish to have the Monthly Schedule reports generated. They are generated on the first day of each Month, at the specified time.

In the **Report period start time** and **Report period end time** lists, specify the period in each day for which the reports are generated. For example, if your Contact Center has a working day that starts at 08:30 and finishes at 17:30, you may wish to specify the Start Time as 08:00 (to see if you have early calls that you are missing by not having the Contact Center open) and 18:00 (to see if there is a late surge of calls).

Figure 87: Add Monthly Schedule page with a schedule shows an example Monthly Schedule that User Mary Smith configured.

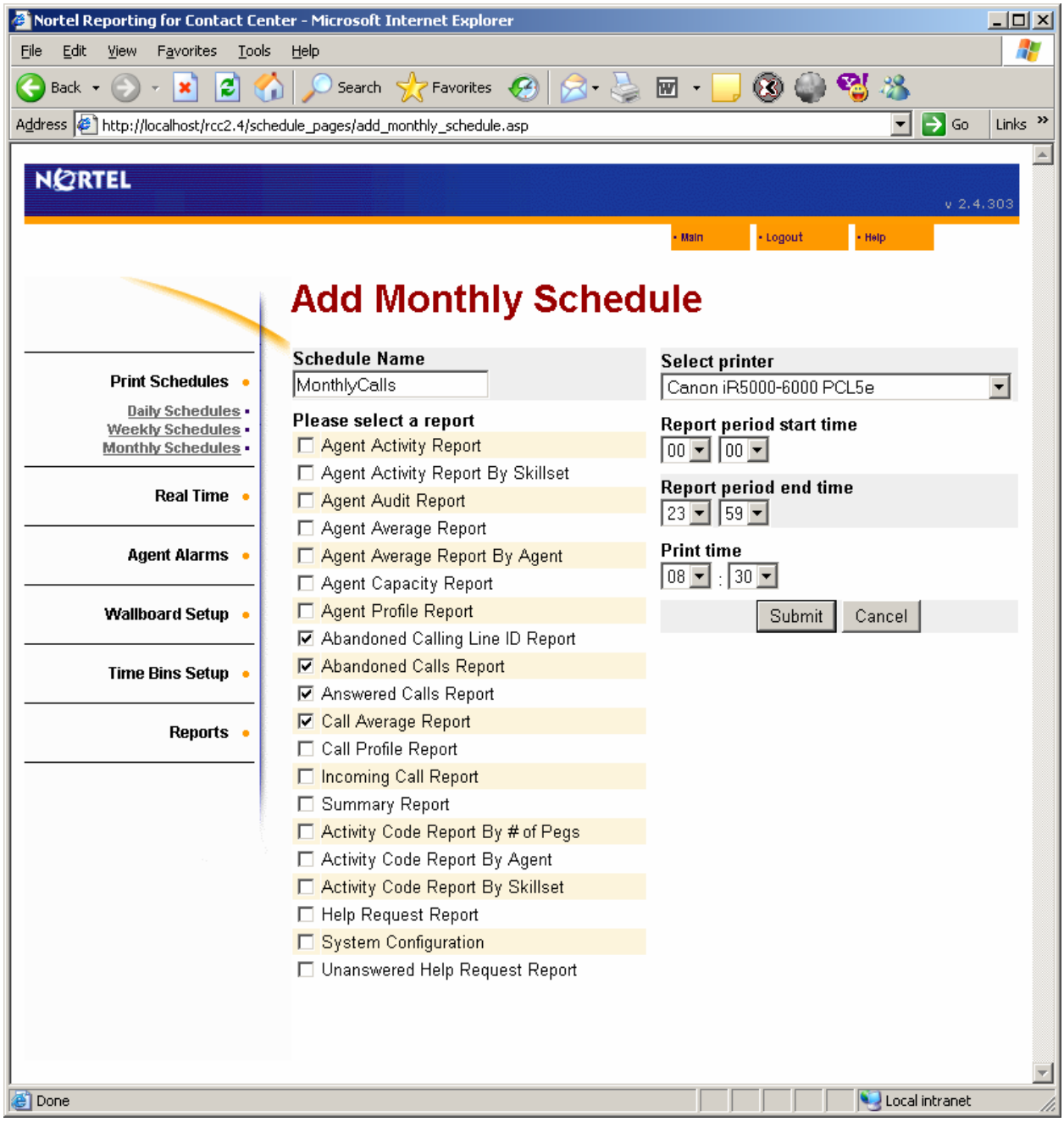


Figure 87: Add Monthly Schedule page with a schedule example

Mary Smith selected the Answered Calls, Abandoned Calls, CLID, and Call Average reports to be printed at 08:30 (on the first day of each new month).

Her schedule is called **MonthlyCalls**. The reports start to generate at 08:30 on the Cannon iR5000-6000 PCL5e printer. The reports cover the period from midnight to midnight for each day.

6. To save your Monthly Schedule click **Submit**. The Monthly Schedules – Skillsets page, shown in Figure 88: Monthly Schedule - Skillsets page appears.

   To leave the Add Monthly Schedule page without saving any changes, click **Cancel**. The Your Monthly Schedules page shown in Figure 85: Your Monthly Schedules page appears.

Monthly Schedule Skillsets

The Monthly Schedule - Skillsets page allows you to select which Skillsets you wish to include in the generated reports that the Monthly Schedule produces.

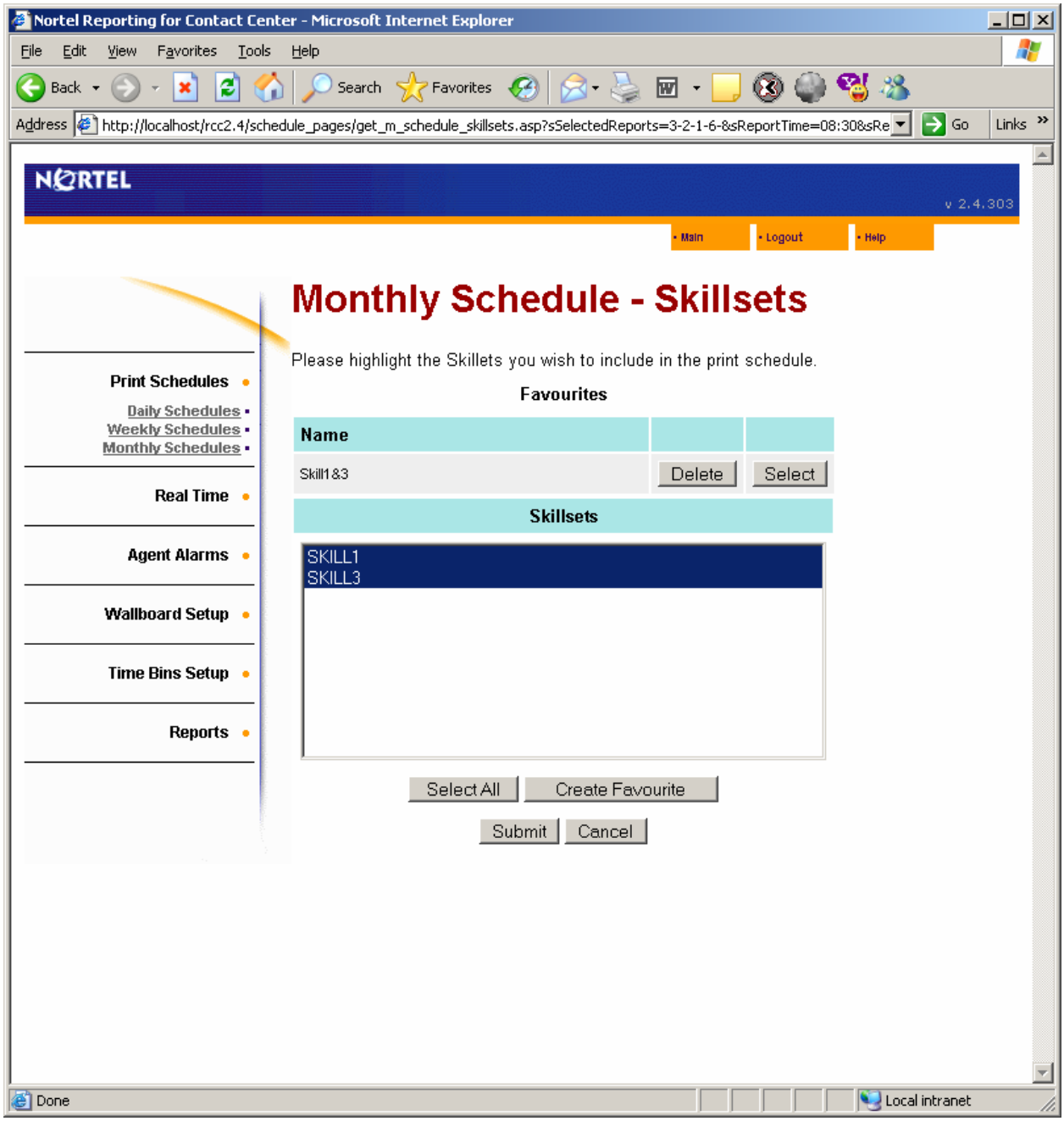


Figure 88: Monthly Schedule - Skillsets page

- For information about using Skillset selection lists, see page 92.
- For information about using Favorites, see page 92.

In the example shown in Figure 88: Monthly Schedule - Skillsets page, User Mary Smith used her Skill1&3 Favorite to select the Development and Training Skillsets.

Note: If you include the Agent Audit Report, the Activity Code Report by Skillset, Agent Activity Code Report by Agent, or the Activity Code Report by # of Pegs Reports in your Print Schedule, you are prompted for the Agents and/or the Activity Codes you wish to have included within these Reports. These steps are described on

pages 176 (Agent Audit Report), 176 (Activity Code Report by Skillset), 176 (Activity Code Report by Agents) and 176 (Activity Code Report by # of Pegs).

To save your Monthly Schedule Skillsets, click **Submit**. The Your Monthly Schedules page shown in Figure 89: Your Monthly Schedules page with a Schedule in the list appears.

To leave the Monthly Schedule – Skillsets page without saving any changes, click **Cancel**. The Your Monthly Schedules page appears, as shown in Figure 85: Your Monthly Schedules page.

Saving your Monthly Schedule

To save your Monthly Schedule, click **Submit**. The Your Monthly Schedules page shown in Figure 89: Your Monthly Schedules page with a Schedule in the list appears. The page shows the schedule you created. In the example, the schedule name is Monthly Calls.

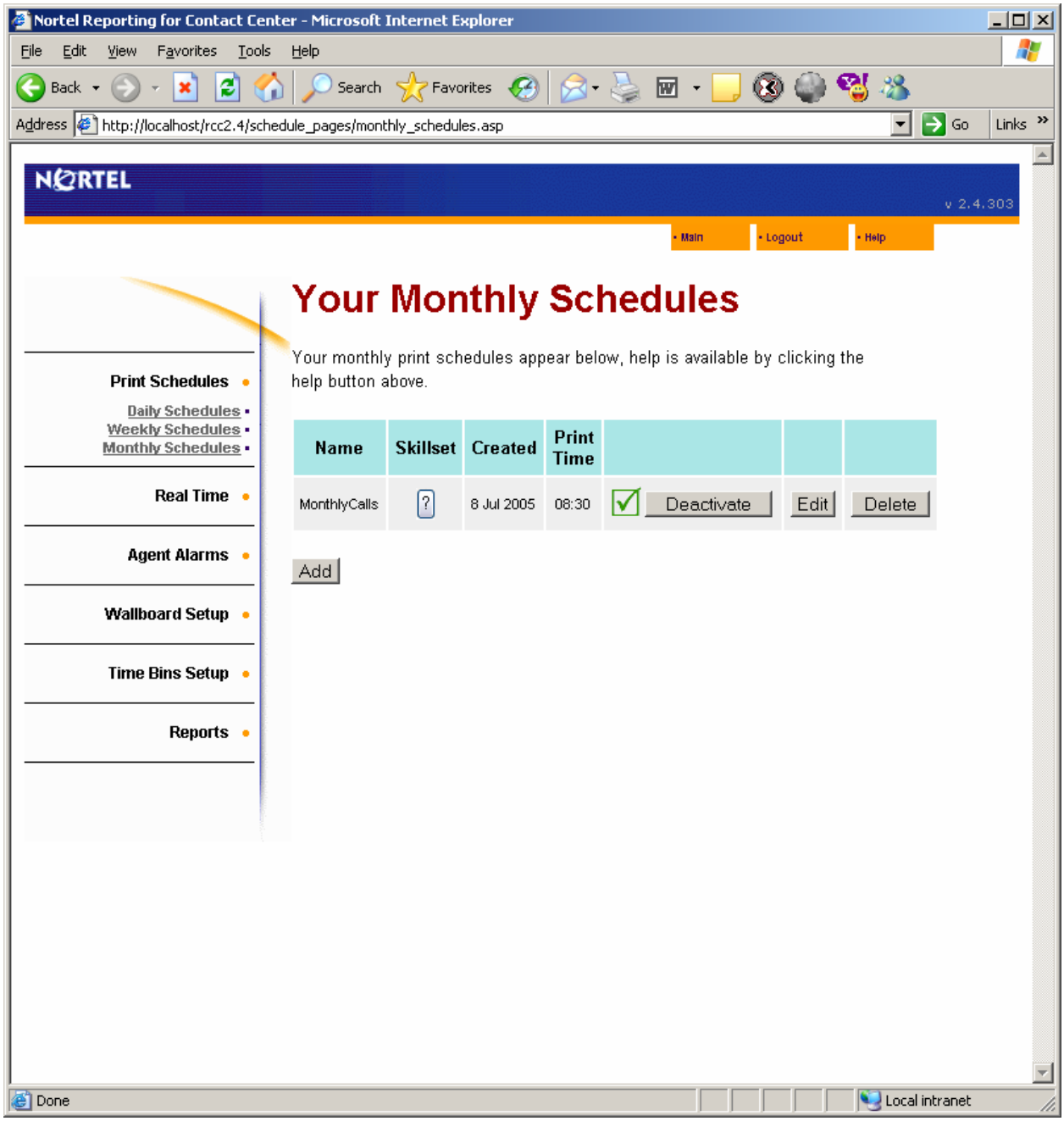
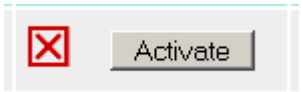


Figure 89: Your Monthly Schedules page with a Schedule in the list

Note that each Schedule can be identified by the Schedule Name that was provided earlier when the Schedule was created.

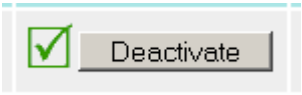
Deactivate

Click **Deactivate** to disable the Print Schedule so that the schedule no longer prints when the schedule is due to run. When a schedule is disabled, the button changes from Deactivate to Activate, and a red cross replaces the green check mark, similar to the following illustration.



Activate

Click **Activate** to enable the Print Schedule so that the schedule prints when the schedule is due to run. When a schedule is enabled, the button changes from Activated to Deactivate, and a green check mark replaces the red cross, similar to the following illustration.



Edit

Click **Edit** to view the Edit monthly Schedule page, shown in Figure 90: Edit Monthly Schedule page.

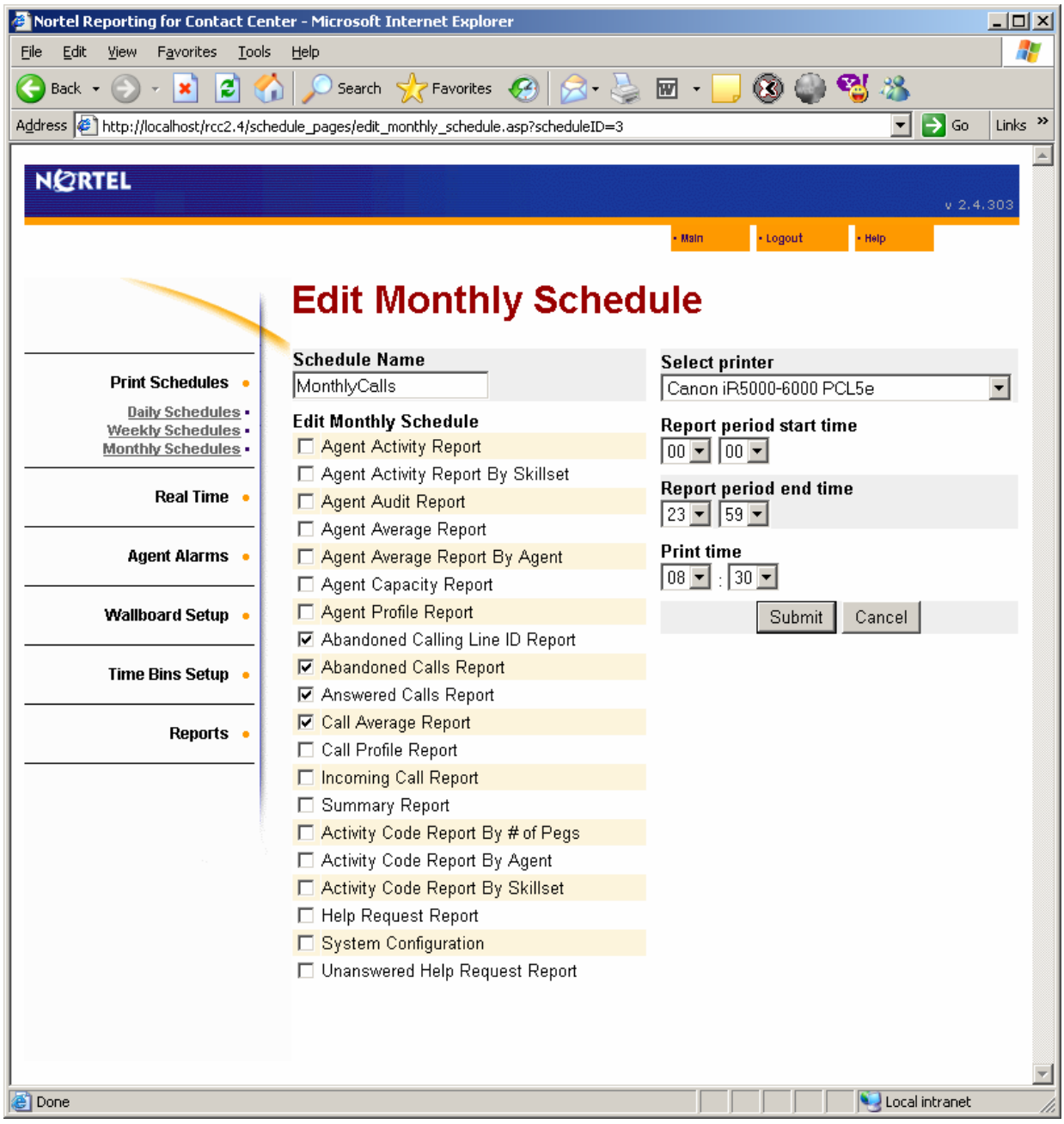


Figure 90: Edit Monthly Schedule page

This page is set up exactly like the Add Monthly Schedule page, except the fields and check boxes are populated with the settings of the Schedule you are editing. In the example, you are editing the Monthly Calls schedule. Make any necessary changes and click **Submit**. The Your Monthly Schedules page appears. See Figure 85: Your Monthly Schedules page.

To leave the Edit Monthly Schedule page without saving any changes, click **Cancel**. The Your Monthly Schedules page appears. See Figure 85: Your Monthly Schedules page.

Delete

Click **Delete** to remove the Schedule from the system and to remove its listing from the Your Monthly Schedules page.

You are prompted to confirm the deletion. After you confirm the deletion, the Your Monthly Schedules page appears. See Figure 85: Your Monthly Schedules page.

Real Time

From the User Main Menu page shown in Figure 69: User Main Menu page, select **Real Time** to view the Real Time page, shown in Figure 91: Real Time page.

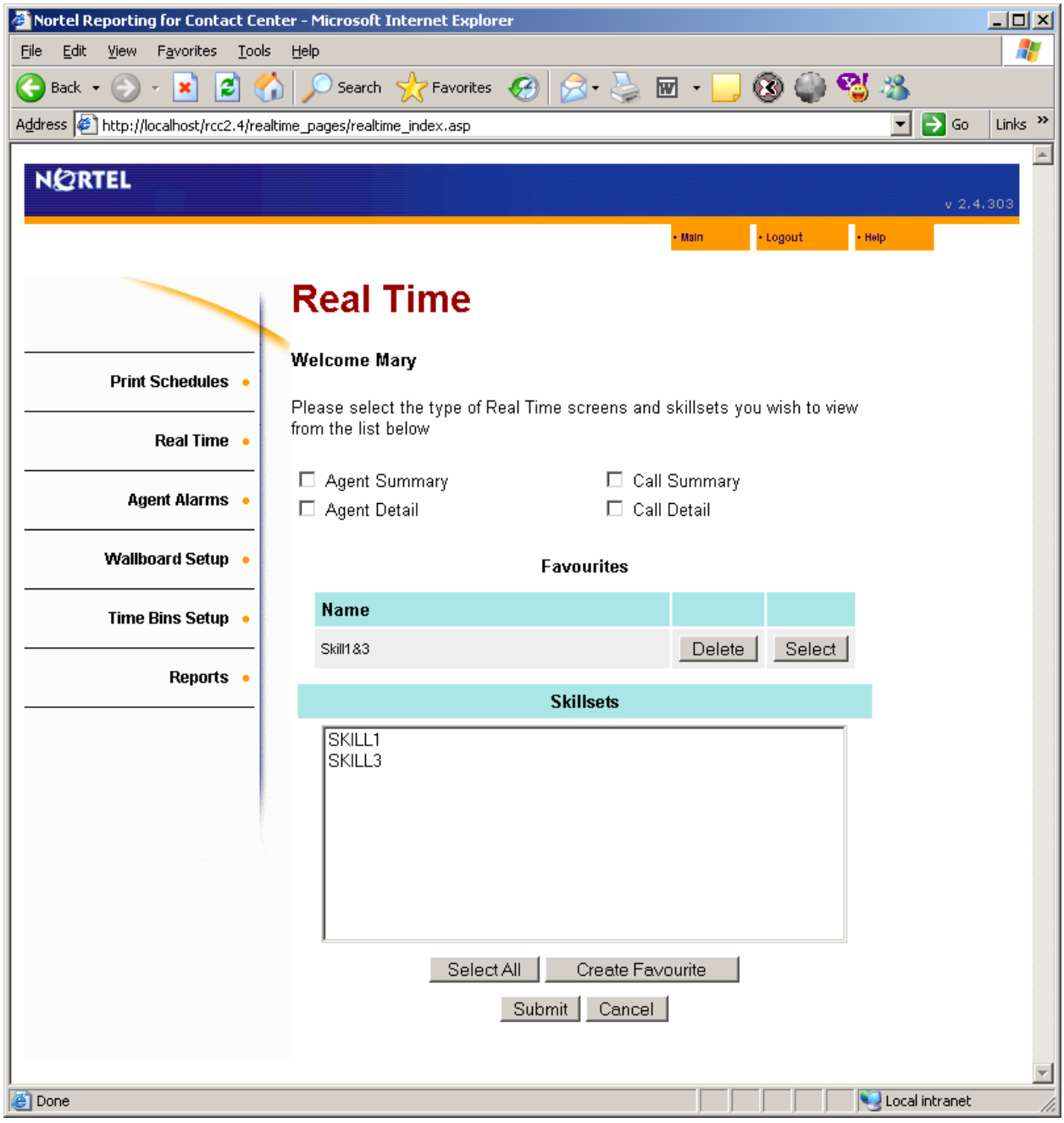


Figure 91: Real Time page

Using the Real Time Options

Perform the following steps to use the Real Time options:

1. To select the Real Time screens you want to view, select a real time screen name.

- For information about using Skillset selection lists, see page 92.
- For information about using Favorites, see page 92.

2. Click **Submit** to view your Real Time selections in a new window. To reset your selections, click **Cancel** at any time.

Note: If a Client PC does not have Java installed, on launching more than one Real Time screen, Java will try to be installed that many times on the Client PC.

It is recommended that the first time the User on a Client PC views a Real Time screen, only one Real Time screen is launched (if the User is not sure that Java is installed on their PC). This is to prevent multiple Java installations taking place on the Client PC.

The following sections describe the available Real Time screens.

Real Time Call Summary

Figure 92: Real Time Call Summary Real Time Screens shows the Call Summary Real Time screen.

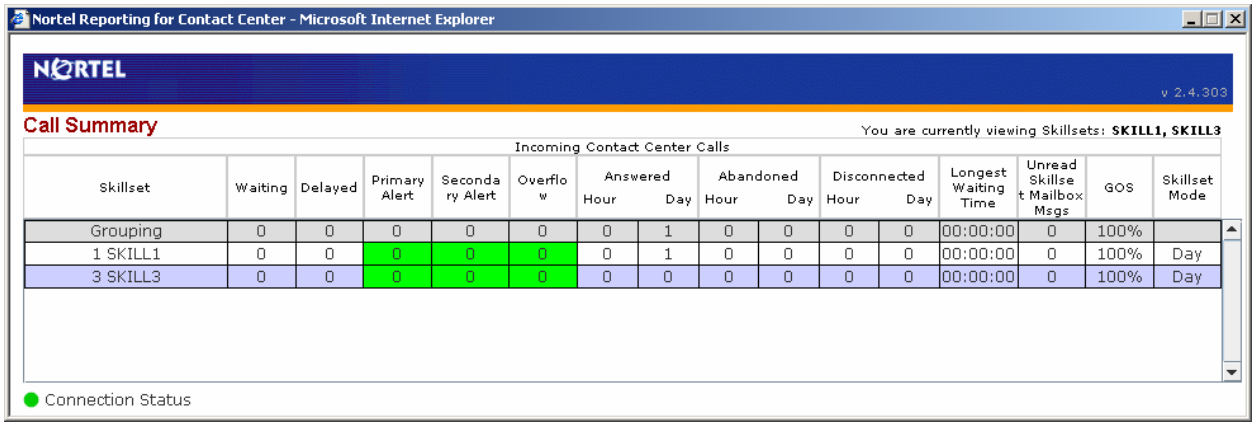


Figure 92: Real Time Call Summary Real Time Screens

The information in the Call Summary screen updates as call activity changes in your Contact Center. Each row in each screen represents a single Skillset. The Skillsets that you see are the skillsets you selected on the Real Time page shown in Figure 91: Real Time page.

The summary provides information about calls that are in the Skillset queues waiting to be answered, together with some statistics regarding calls that are completed. These statistics update in real time.

The following sections describe the available information for each of the selected Skillsets.

Waiting

Waiting indicates the number of calls that are currently waiting in the Skillset queues to be answered.

Delayed

Delayed indicates the number of calls that are currently in a delayed state, that is, having reached the contact center but have not been forwarded to a skillset.

Primary Alert

Primary indicates the number of currently waiting Calls that have waited in excess of the Contact Center Primary Alert. (Note that this is mutually exclusive with the Secondary Alert). If any calls have waited in excess of the Primary Alert, the background to this cell changes to yellow.

Secondary Alert

Secondary Alert indicates the number of currently waiting Calls that have waited in excess of the Contact Center Secondary Alert. (Note that this is mutually exclusive with the Primary Alert). If any calls have waited in excess of the Secondary Alert, the background to this cell changes to red.

Overflow

Overflow indicates the number of currently waiting Calls that have waited in excess of the Contact Center Overflow Threshold. Note that this does not mean the call has overflowed, but the Contact Center is actively looking through the overflow rules that have been defined for this Skillset to find a means of answering the call. That is, this call is liable to overflow shortly. If any calls have waited in excess of the Overflow Threshold, the background to this cell changes to red.

Note that if a call had passed the overflow threshold in one Skillset and was then moved to another Skillset due to the call routing that was configured, the call appears in the new Skillset; the cell background will be red because this call has already passed the overflow threshold of its original Skillset.

Abandoned Hour/Day

Abandoned Hour/Day indicates the number of calls that were abandoned in the Skillsets, in the current hour and in the current day.

Answered Hour/Day

Answered Hour/Day indicates the number of calls that were answered by the Agents in the Skillsets, in the current hour and in the current day.

Disconnected Hour/Day

Disconnected Hour/Day indicates the number of calls that were disconnected by the call center in the current hour and in the current day.

Longest Waiting Time

Longest Waiting Time indicates the waiting time of the call that has waited the longest, of the list of currently waiting calls.

Unread Skillset Messages

Indicates the number of voice mail messages in the Skillset Mailbox which have not be listened to. If any messages have not been listened to, the cell background is red.

GOS

Indicates the grade of service currently offered to incoming callers.

Skillset Mode

Indicates whether the mode of operation of the Skillset.

Grade of Service

The first row in the Call Summary Real Time screen is labeled Grouping. This row shows values generated from the data presented for each of the included skillsets. Note that the values might not include all the skillsets in the System because the User viewing the Call Summary screen might not be assigned to all the skillsets, or they may be viewing only a selection of their assigned skillsets.

The Grade of Service figure in the Grouping row is a means average of the GOS values of the skillset rows displayed below the Grouping row.

For example, three skillsets are in the view, and they had the following individual skillset values:

Skill 1 GOS = 0%

Skill 2 GOS = 100%

Skill 3 GOS = 100%

The Grouping row shows a GOS of 66%, calculated as follows:

GOS = (0 + 100 + 100) / 3 = 66%

This value shows the User what their average GOS is over all the selected skillsets. This figure is different from the GOS for the System (which includes all the skillsets). The System GOS is **not** calculated as an average for the skillsets; it is calculated as a single figure GOS for the System.

This is the calculation that is used in the System wallboard parameters SH and SD and in the Call Detail real time. In the Call Detail real time screens and in the System SH and SD wallboard fields, the GOS is calculated using the following formula: (This formula is also described in the Glossary.)

```
Presented    = Total Number of Direct Call transactions
               Presented to the Skillset(s)
Abandoned    = Calls which Abandoned
>Secondary   = Calls transactions answered after the
               Secondary Alert has elapsed

G of S% =  Presented – Abandoned – >Secondary   x 100
                          Presented
```

Real Time Agent Summary

Figure 93: Real Time Agent Summary Real Time Screen shows the Agent Summary Real Time screen.

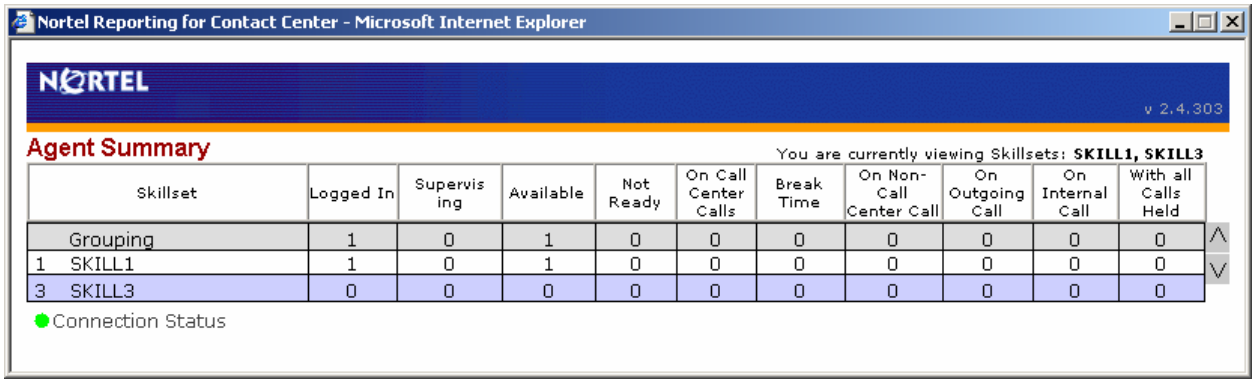


Figure 93: Real Time Agent Summary Real Time Screen

The information shown in the Agent Summary screen updates as Agent activity changes in your Contact Center. Each row in each screen represents a single Skillset. The Skillsets that you see are the skillsets you selected on the Real Time page as shown in Figure 91: Real Time page.

This Real Time screen indicates the numbers and states (current activities) of the logged-in Agents, for each of the selected Skillsets.

Note that the state of an Agent who has multiple calls on their handset is taken from their active call. For example, if an Agent has an Incoming Contact Center Call on hold and they are active on an Outgoing Call, then the Agent is shown to be in the Outgoing Call state. The following sections describe the available information.

Skillset

Indicates which Skillset the information in this row represents.

Logged In

Logged In indicates the number of Agents who are logged into this Skillset.

Supervising

Supervising indicates the number of Agents (Supervisors) who are currently supervising other Agents.

Available

Available indicates the number of Agents who are Available to take Incoming Contact Center Calls.

Not Ready

Not Ready indicates the number of Agents who are in the Not Ready State. They might have invoked the Make Not Ready feature. Or they might have been placed in the Not Ready state because a Contact Center Call was presented ringing to their handset but the Agent did not

answer it, and Nortel Reporting for Contact Center automatically took the call back to the Skillset queue and made them Not Ready.

On Contact Center Calls

On Contact Center Calls indicates the number of Agents who are currently handling Incoming Contact Center Calls.

Break Time

Break Time indicates the number of Agents who are in Break Time following clear down of an Incoming Contact Center Call.

On Non-Contact Center Calls

On Non-Contact Center Calls indicates the number of Agents who are currently handling calls that have not arrived through the Contact Center. These calls could be calls that arrived directly at their handset because someone rang their Direct Inward Dialing (DID) line, for example, or a non-Contact Center Call was transferred to them from another handset.

On Outgoing Calls

On Outgoing Calls indicates the number of Agents who are currently on Outgoing Calls.

On Internal Calls

On Internal Calls indicates the number of Agents who have placed or answered internal (intercom) calls.

With All Calls Held

With All Calls Held indicates the number of Agents who have all of their current calls on hold.

Real Time Call Detail

Figure 94: Real Time Call Detail Screen shows the Call Detail screen.

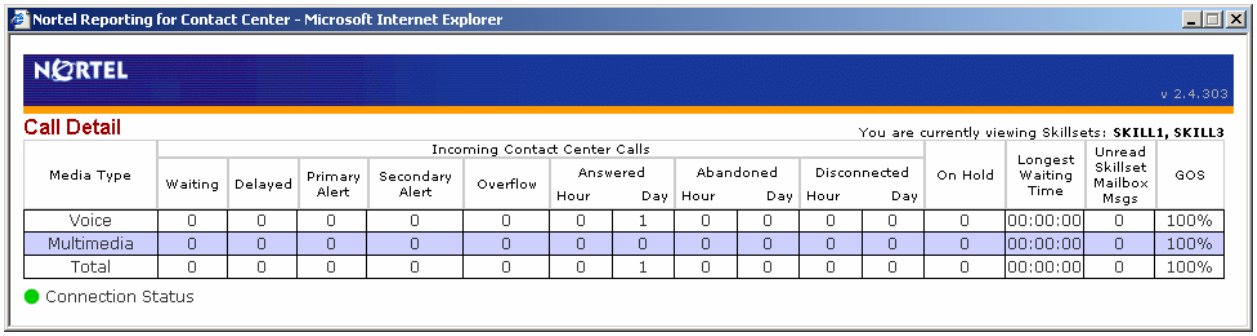


Figure 94: Real Time Call Detail Screen

The Call Detail Real Time screen presents a detailed display of the status of waiting calls together with statistics relating to completed calls. These statistics update in real time.

The screen displays a separate line of information for Multimedia Calls and for Voice (PSTN) Calls and a total for both types of calls. The following sections describe the available information.

Media Type

Media Type indicates whether the line of statistics relates to Multimedia Call or Voice (PSTN) Calls or a total for both types of call.

Waiting

Waiting indicates the number of calls that are currently waiting in the Skillset queues to be answered.

Delayed

Delayed indicates the number of calls that are currently in a delayed state that is having reached the contact center but have not been forwarded to a skillset.

Primary Alert

Primary Alert indicates the number of currently waiting Calls that have waited in excess of the Contact Center Primary Alert. (Note that this is mutually exclusive with the Secondary Alert). If any calls have waited in excess of the Primary Alert, the background to this cell changes to yellow.

Secondary Alert

Secondary Alert indicates the number of currently waiting Calls that have waited in excess of the Contact Center Secondary Alert. (Note that this is mutually exclusive with the Primary Alert.) If any calls have waited in excess of the Secondary Alert, the background to this cell changes to red.

Overflow

Overflow indicates the number of currently waiting Calls that have waited in excess of the Contact Center Overflow Threshold. Note that this does not mean the call has overflowed, but the Contact Center is actively looking through the overflow rules that were defined for this Skillset to find a means of answering the call. That is, this call is likely to overflow shortly. If any calls have waited in excess of the Overflow Threshold, the background to this cell changes to red.

Note that if a call had passed the overflow threshold in one Skillset and was then moved to another Skillset due to the call routing that was configured, the call appears in the new Skillset and the cell background is red because this call has already passed the overflow threshold of the original Skillset.

Abandoned Hour/Day

Abandoned Hour/Day indicates the number of calls that were abandoned in the Skillsets, in the current hour and in the current day.

Answered Hour/Day

Answered Hour/Day indicates the number of calls that were answered by the Agents in the Skillsets, in the current hour and in the current day.

Disconnected Hour/Day

Disconnected Hour/Day indicates the number of calls that were disconnected by the call center in the current hour and in the current day.

On Hold

Indicates how many calls are placed on hold.

Longest Waiting Time

Longest Waiting Time indicates the waiting time of the call that has waited the longest, of the list of currently waiting calls.

Unread Skillset Mailbox Msgs

Indicates the number of voice mail messages in the Skillset Mailbox that have not be listened to. If any messages have not been listened to, the cell background is red.

GOS

GOS indicates the Grade of Service being offered to incoming callers.

Real Time Agent Detail

Figure 95: Agent Detail Real Time shows a detailed display of the individual status of the logged-in Agents, together with statistics relating to calls answered and made by the Agents. These statistics update in real time.

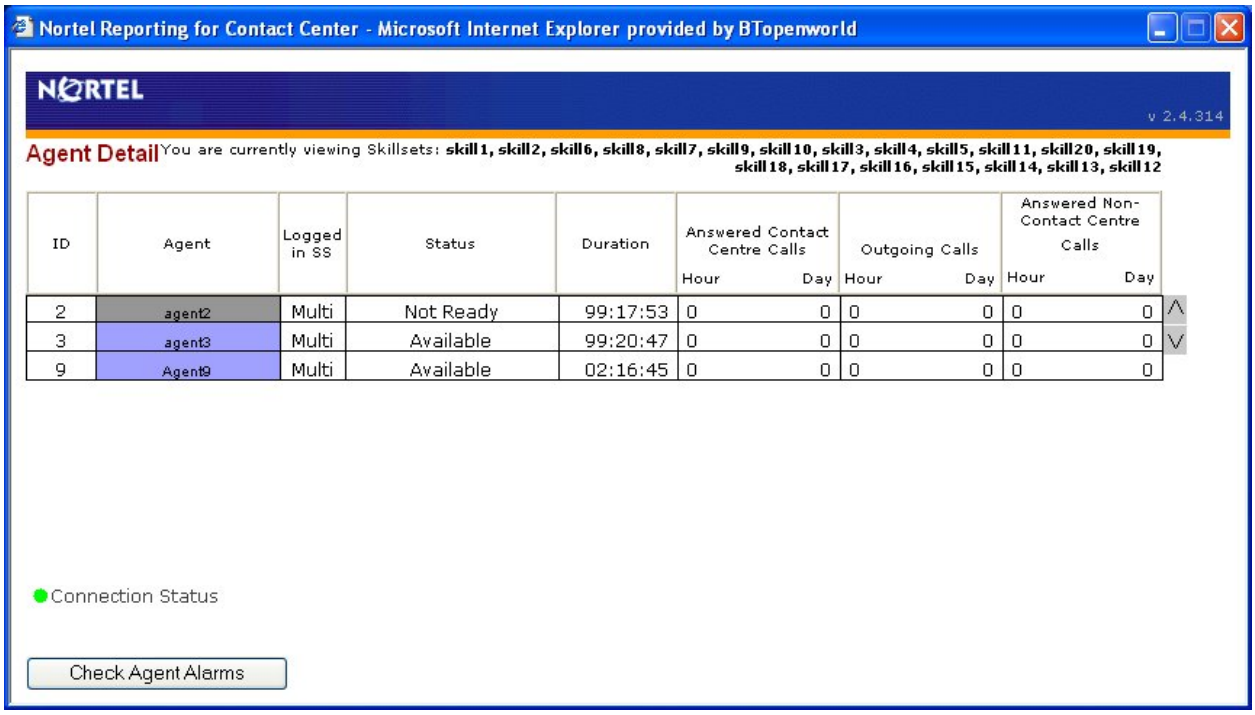


Figure 95: Agent Detail Real Time

Each line of the Agent Detail Real Time screen represents a single Agent.

The following sections describe the available information.

ID

Indicates the Contact Center ID of the Agent.

Agent

Indicates the name of the Agent and indicates the state the Agent is in by coloring the cell background. The state of the Agent depends on their current activity. Further detail on the Agent state can be seen in the Status column, as follows:

- Incoming

  An Agent is in the Incoming State when they have answered an Incoming Contact Center Call. The information in the Status column indicates the type of call. The Incoming State is represented by light green.

- Break Time

  Break Time is the term used to describe the period of time allocated to each Agent to allow post-call completion work, also called wrap-up. Break Time is represented by dark green.

- Outgoing

  When an Agent makes an Outgoing Call, the Agent is in the Outgoing State. The Outgoing State is represented by yellow.

- Supervisory Monitoring

  When an Agent who is created in the Contact Center as a Supervisor undertakes a monitoring session with another Agent, they are represented in the Real Time screen using gold. The Status column displays Monitoring.

- Non-Call Contact Center Call

  If the Agent answers a non-Contact Center Call, they are represented using grey.

- Available

  Blue represents Available Agents. These are Agents who are available to answer Incoming Contact Center Calls.

- All Calls Held

  Magenta indicates an Agent who has placed all of their calls on hold.

- Not Ready

  Dark grey represents Agents who are in the Not Ready state.

Logged In SS

Indicates the Skillsets the Agent is currently logged in to.

Status

This column provides additional detail about the Agent state, as follows:

- A phone icon with the wording Multimedia represents a Multimedia voice call.
- A phone icon with the wording Voice represents a normal voice call.
- A phone icon with the wording Outgoing represents an outgoing call.
- A phone icon with the wording Intercom represents an internal call.
- The word Available represents an Available Agent.

- The wording Break Time represents an Agent in Break Time.
- The wording Calls Held represents an Agent with all of their current calls on hold.
- The wording Not Ready represents an Agent who is in the Not Ready state.
- The word Monitoring represents an Agent who is a Supervisor engaged in a Supervisory Monitoring session with another Agent, or in a Help Session.
- A smiley icon represents a Multimedia Chat session.
- A globe icon represents a Multimedia Follow-me browsing session.
- A number accompanies the status description in the form of SS*x*. This indicates the Skillset associated with the call. For example, SS2 indicates Skillset 2.

Duration

Displays a timer that represents the time the Agent has spent in the current state. If the Agent has been in the current state for a period in excess of the associated Agent Alarm, the background of this cell turns red. See Agent Alarms.

Answered Call Center Calls Hour / Day

Answered Call Center Calls Hour/Day indicates the number of Contact Center Calls that this Agent has answered in the current hour and in the current day.

Outgoing Calls Hour / Day

Outgoing Calls Hour/Day indicates the number of Outgoing Calls that this Agent has made in the current hour and in the current day.

Answered Non-Contact Center Calls Hour / Day

Answered Non-Contact Center Calls Hour/Day indicates the number of Non-Contact Center Calls that this Agent has answered in the current hour and in the current day.

Check Agent Alarms

Click **Check Agent Alarms** to update any Agent Alarms that had been set through Reporting for Contact Center after the Agent Detail Real Time screen had been opened.

Agent Alarms

The Agent Alarms option allows you to set Real Time thresholds that operate with reference to the Contact Center activity of the Agents.

For example, you can specify average durations of Incoming or Outgoing calls, and Nortel Reporting for Contact Center will highlight Agents who have been on a call longer than the specified threshold.

From the User Main Menu page shown in Figure 69: User Main Menu page, select **Agent Alarms** to view the Agent Alarms page shown in Figure 96: Agent Alarms Menu page.

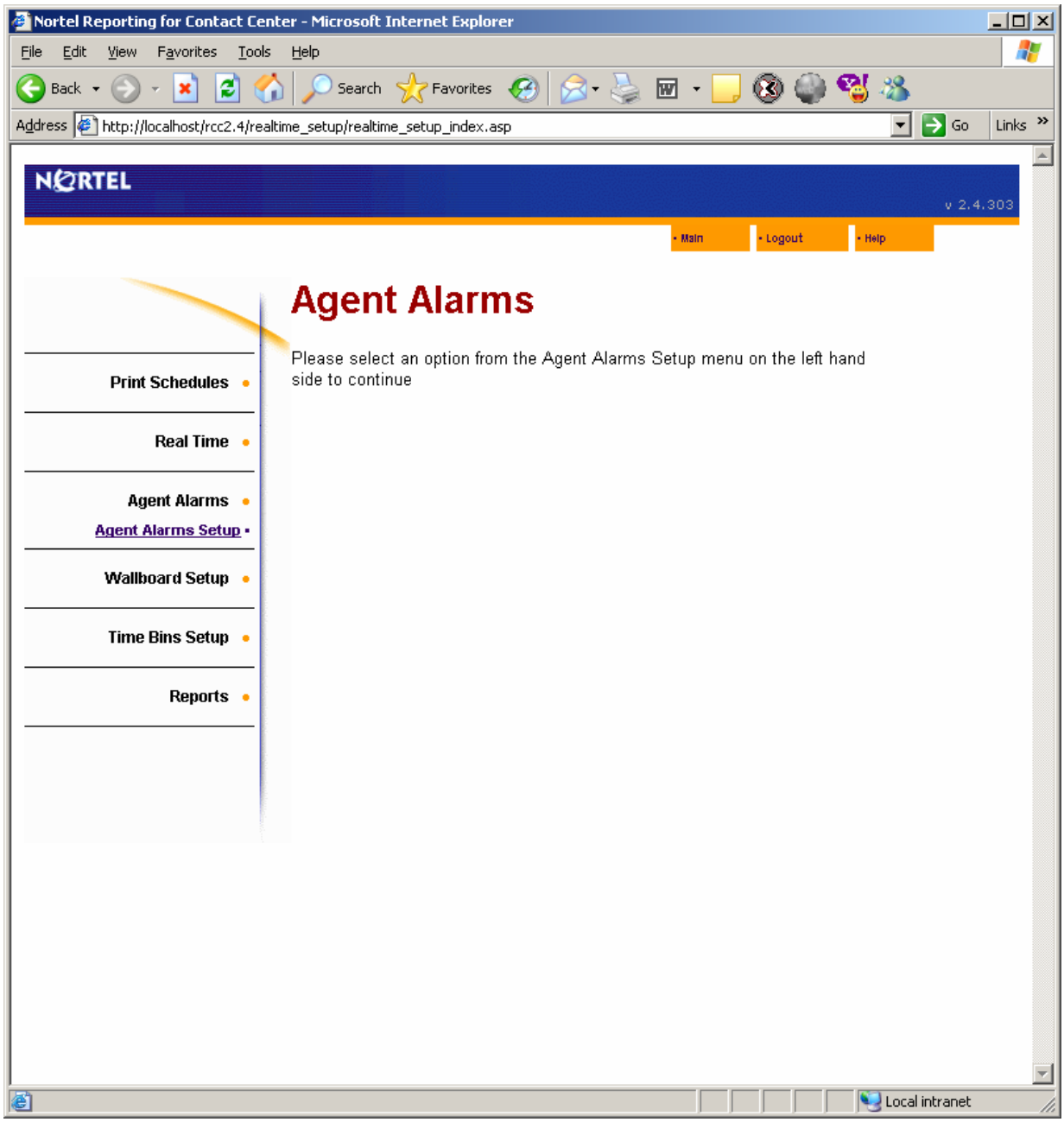


Figure 96: Agent Alarms Menu page

Select **Agent Alarm Setup** to view the Agent Alarm Setup Skillset selection page shown in Figure 97: Agent Alarms Setup page.

This page allows the User to select their assigned Skillsets for which they wish to establish the Agent Alarms settings.

In the example shown in Figure 97: Agent Alarms Setup page, the Skillset list shows the Skillsets that User Mary Smith selected.

In a previous example, User Mary Smith saved SKILL1 and SKILL3 to her favorites list and named the favorite Skill1&3. See Figure 75: Save Favourites page. To select these skillsets for Agent Alarms Setup, she selected Skill1&3 from her favorites list, and Nortel Reporting for Contact Center automatically selected the Skill1 and Skill3.

- For a discussion of using Skillset selection lists see page 92.
- For a discussion on using Favorites, see page 92.

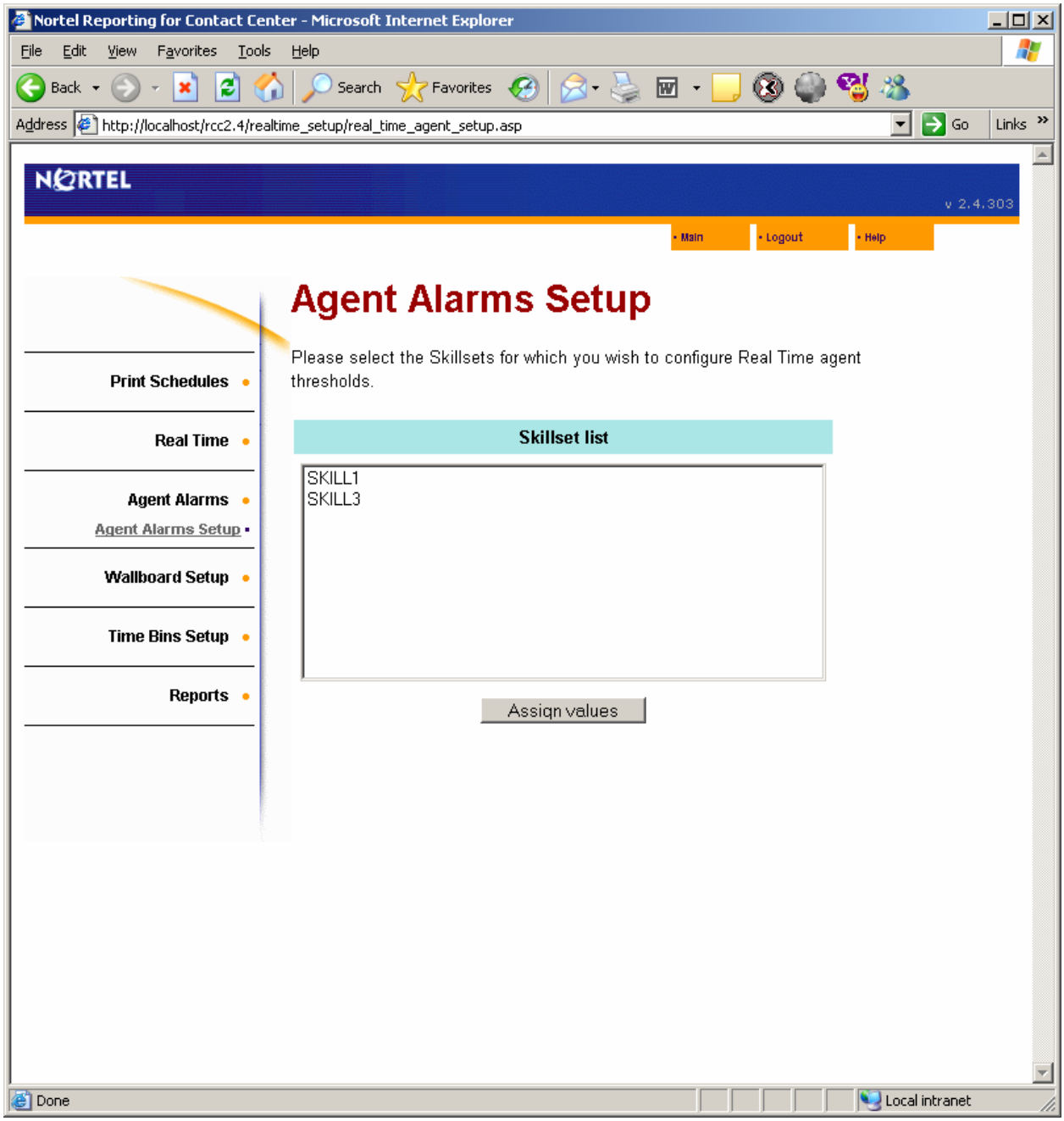


Figure 97: Agent Alarms Setup page

When you select your Skillset, click **Assign values** to view the Agent Alarms Values page shown in Figure 98: Agent Alarms Values page.

The Agent Alarms Values page allows you to specify threshold values for the following Agent activities (also called Agent states):

Available	Agent is free to take a call
Internal Call	Agent is on an intercom call
Outgoing Call	Agent has placed a call to an external party
Incoming Contact Center Call	Agent has answered a Contact Center Call
Incoming Multimedia Call	Agent has answered a Multimedia Call Center Call

Incoming Non-Contact Center	Agent has answered a non-Contact Center Call from an external party
Not Ready	The Agent is in the Not Ready state

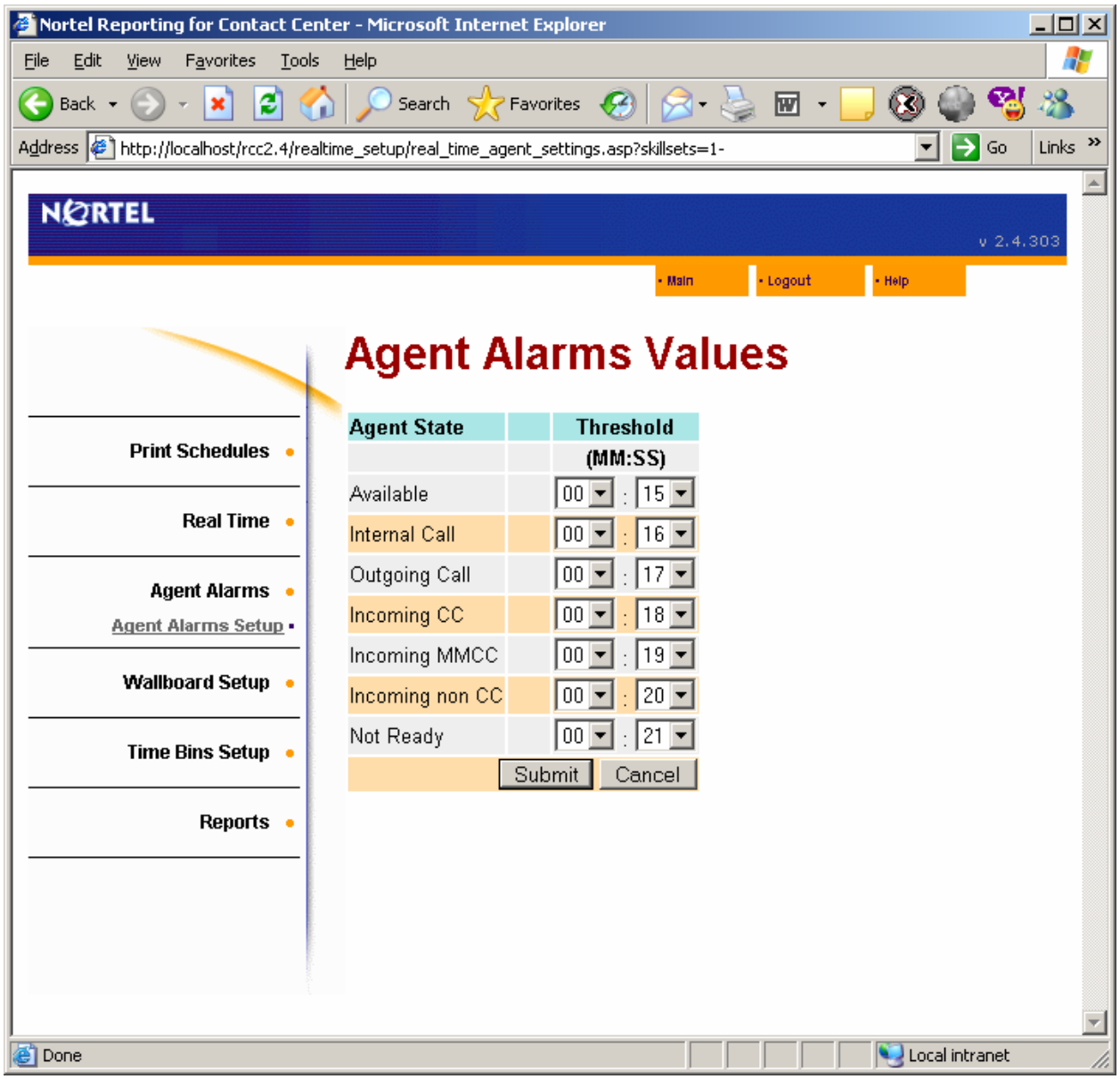


Figure 98: Agent Alarms Values page

Select the value for each Agent State. To save the Agent Alarms Values settings, click **Submit**. The Agent Alarms Setup page appears. See Figure 97: Agent Alarms Setup page.

To leave the Agent Alarms Values page without saving any changes, click **Cancel**. The Agent Alarms Setup page appears. See Figure 97: Agent Alarms Setup page.

Wallboard Setup

If your supervisor has assigned you the rights to the Wallboard Setup option (see Add Users), you can use the Wallboards option to assign wallboards to your assigned Skillsets. You can also configure the wallboards with features such as wallboard alarms and messages, schedules, and summaries.

If your Administrator has not assigned you the rights to assign wallboards, the Wallboard Setup option is unavailable on the user Main Menu page. See Figure 69: User Main Menu page.

Nortel Reporting for Contact Center can support both hardware and software IP-enabled wallboards. The wallboards that are supported are the *ip***View** Wallboards (hardware tri-color wallboards) and the *ip***View** SoftBoard (software-based personal wallboard); refer to the *ipView Software Wallboard Setup and Operation Guide* (NN40010-500), for more information on *ip***View** SoftBoards. They are updated approximately every 1 (default) or 3 seconds depending on the settings in the

Contact Center Connection page, page 58.

Message Formats

The information sent to the wallboards is in one of three different formats: Parameter Messages, Scrolling Messages, or Summary Messages. The following sections describe these message formats.

Parameter Messages

Parameter Messages are the display messages sent to the wallboard.

Parameter Messages show six statistical parameters, each of which appears beside a two-letter mnemonic abbreviation. (If the wallboard is configured to have a title, then only three parameters can be displayed.)

The following parameters are available for display on the wallboards:

ID	Number of Incoming calls received in the current Day
IH	Number of Incoming calls received in the current Hour
AD	Number of Abandoned calls in the current Day
AH	Number of Abandoned calls in the current Hour
OD	Number of Outgoing calls made in the current Day
OH	Number of Outgoing calls made in the current Hour
SD	Grade of Service offered in the current Day (%)
SH	Grade of Service offered in the current Hour (%)
AO	Number of Agents on Outgoing calls
AI	Number of Agents on Incoming calls
AA	Number of Agents Available to receive calls
AN	Number of Agents in the Not Ready state
AL	Number of Agents Logged in
QL	Current Queue Length – number of calls queuing for this Skillset
QT	Current Queue Time for the longest waiting Call for this Skillset measured in seconds.

On the wallboards, the numerical values are displayed in yellow, and the abbreviations are displayed in green.

If one of the parameter values has an associated Alarm threshold configured for it, it appears in red when the threshold is broached. An audible alert for alarms is optional, see page 138.

Scrolling Messages

The wallboards also support Scrolling Messages (also known as rolling messages). Scrolling Messages are either manually dispatched messages, Alarm messages, or Scheduled messages.

Scrolling messages move from right to left across the wallboard until the whole message has been displayed at least two times. An audible alert for scrolling messages is optional.

> **Note**: On the *ip***View** SoftBoard, the scrolling messages do not scroll; they are displayed in their entirety in a window, for the duration that it would take for that message to scroll at least two times on the hardware wallboard. Also note that the numerical

parameter display is removed from *ip***View** SoftBoard for the duration of the message display.

Note: The User must ensure that spaces are placed at the end of each word when creating messages for the *ip***View** SoftBoard otherwise the full message can not display the full message if it is a long string of characters without any spaces.

Scrolling messages are displayed on the wallboards under the following three circumstances:

- A Contact Center statistic has entered an Alarm state (generating an Alarm message).
- A predefined time has arrived (generating a scheduled message).
- A User has generated and dispatched a message (Instant [manual] message).

Nortel Reporting for Contact Center can be configured to provide an audible alert for any of these scrolling messages.

A scrolling message can be up to 64 characters in length and can contain parameter values that are automatically replaced by the numerical equivalent when they are displayed.

For example, if a message contained the text:

There are (QL) calls waiting…

The Contact Center statistic QL currently has a value of 4; the following message would be displayed:

There are 4 calls waiting…

Alarm Messages

Nortel Reporting for Contact Center can be configured to automatically provide a scrolling text message when a parameter enters an Alarm condition by passing a defined Alarm Threshold.

A profile of six different Alarm Thresholds can be set across a day, for a single Alarm.

For example, a 24-hour Contact Center that has 25 Agents active during the day might have an Alarm Message set to be triggered if 6 Agents are Not Ready concurrently. At Night, however, the Contact Center has a staff of 4 Agents, and they want to have the same Alarm Message triggered when only 2 Agents make themselves Not Ready.

Alarm messages scroll at least twice on the wallboards. If the alarm is still valid when the message has scrolled at least twice, the normal numerical display is shown for 5 seconds before the alarm message is re-scrolled.

If several alarms are triggered at once they are scrolled to the wallboard as follows:

1. Assume three alarms are triggered concurrently. The first alarm message is scrolled at least twice, and then the normal numerical display is shown for 5 seconds. The second alarm message is then scrolled at least twice, and the normal numerical display is shown again for 5 seconds.
2. If the third alarm is still valid, then the third alarm message is scrolled at least twice and the display then returns to the usual numerical display for 5 seconds.
3. If the first alarm is valid, it is scrolled again. If it is not valid, then the second alarm is checked to see whether it is valid. If the second alarm is valid, it is scrolled again.

4. If it is not valid, then the third alarm is checked to see whether it is valid. In this way, all alarms are rotated and displayed with a numerical display of 5 seconds in between them.

Scheduled Messages

Wallboard Messages that need to go out at the same time every day or on a particular day can be associated with a schedule.

For example, weekly fire alarm tests or a start of shift greeting or an end of shift message could be configured so that they automatically trigger at the specified time.

Schedules can be configured to trigger on single days, groups of days, or every day.

Scheduled messages take priority over Alarm messages.

Instant Messages

System Administrators or Users can manually enter and dispatch an Instant Message to the wallboards. Instant messages take priority over Alarm messages.

Summary Messages

Nortel Reporting for Contact Center can be configured to provide predefined hourly summaries on the wallboards. Summaries can be configured to have an audible alert.

The values displayed in the summary messages are as follows:

- Incoming Calls for previous Hour and Day so far
- Outgoing Calls for previous Hour and Day so far
- Answered Calls for previous Hour and Day so far
- Grade of Service for previous Hour and Day so far

Using the Wallboard Options

To use the Wallboard Options, select **Wallboard Setup** from the User Main Menu page (see Figure 69: User Main Menu page). The Wallboard Menu page shown in Figure 99: Wallboard Menu page appears.

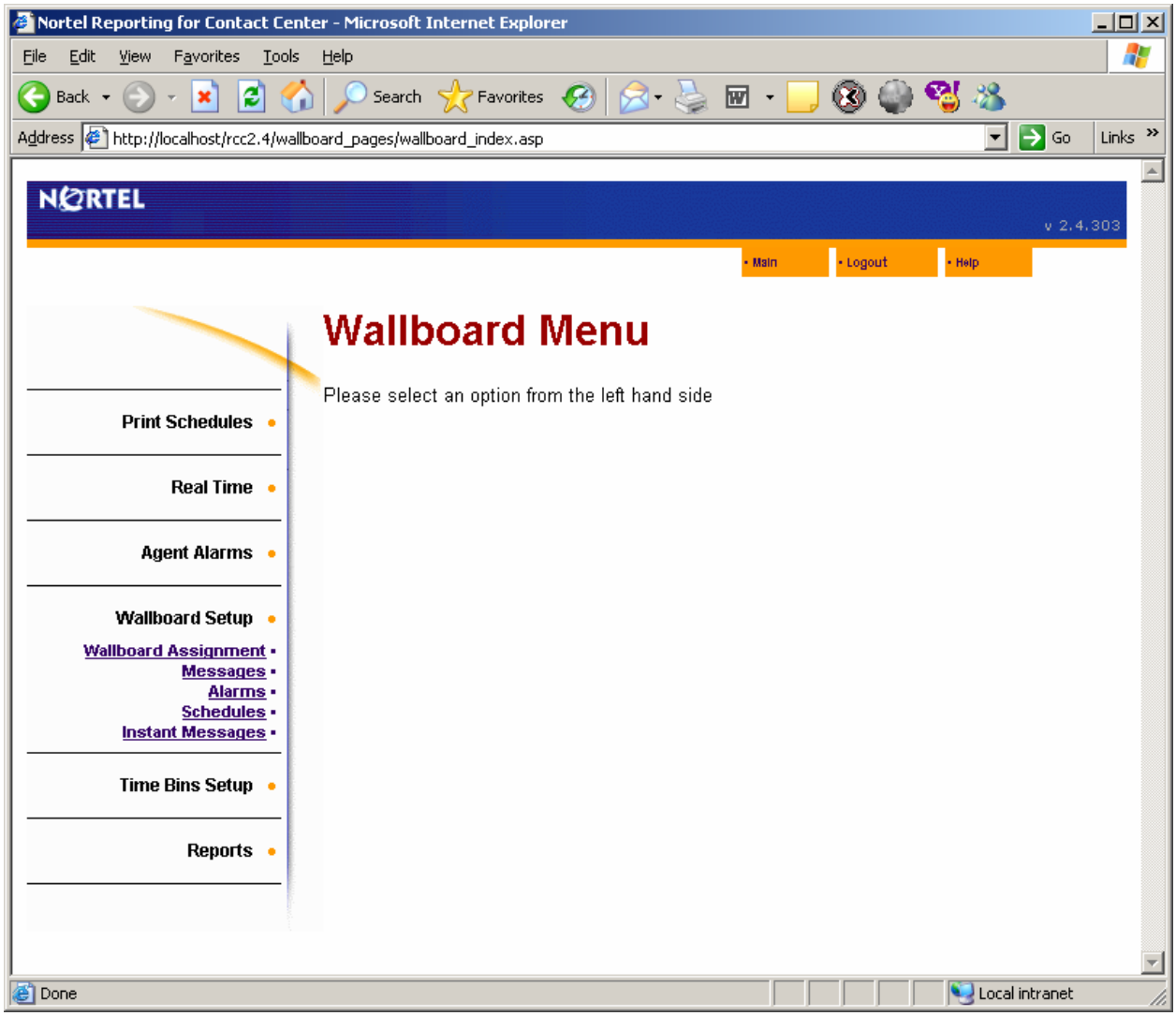


Figure 99: Wallboard Menu page

The Wallboard Setup options are as follows:

- Wallboard Assignment
- Messages
- Alarms
- Schedules
- Instant Messages

The following sections describe the Wallboard Setup options.

Wallboard Assignment

Select the Wallboard Setup **Wallboard Assignment** option to view the Wallboard Assignment page shown in Figure 100: Wallboard Assignment page. This page displays a list of the configured wallboards. It displays the configured wallboards for each of the Skillsets you are assigned and any Skillsets that are configured as System wallboards.

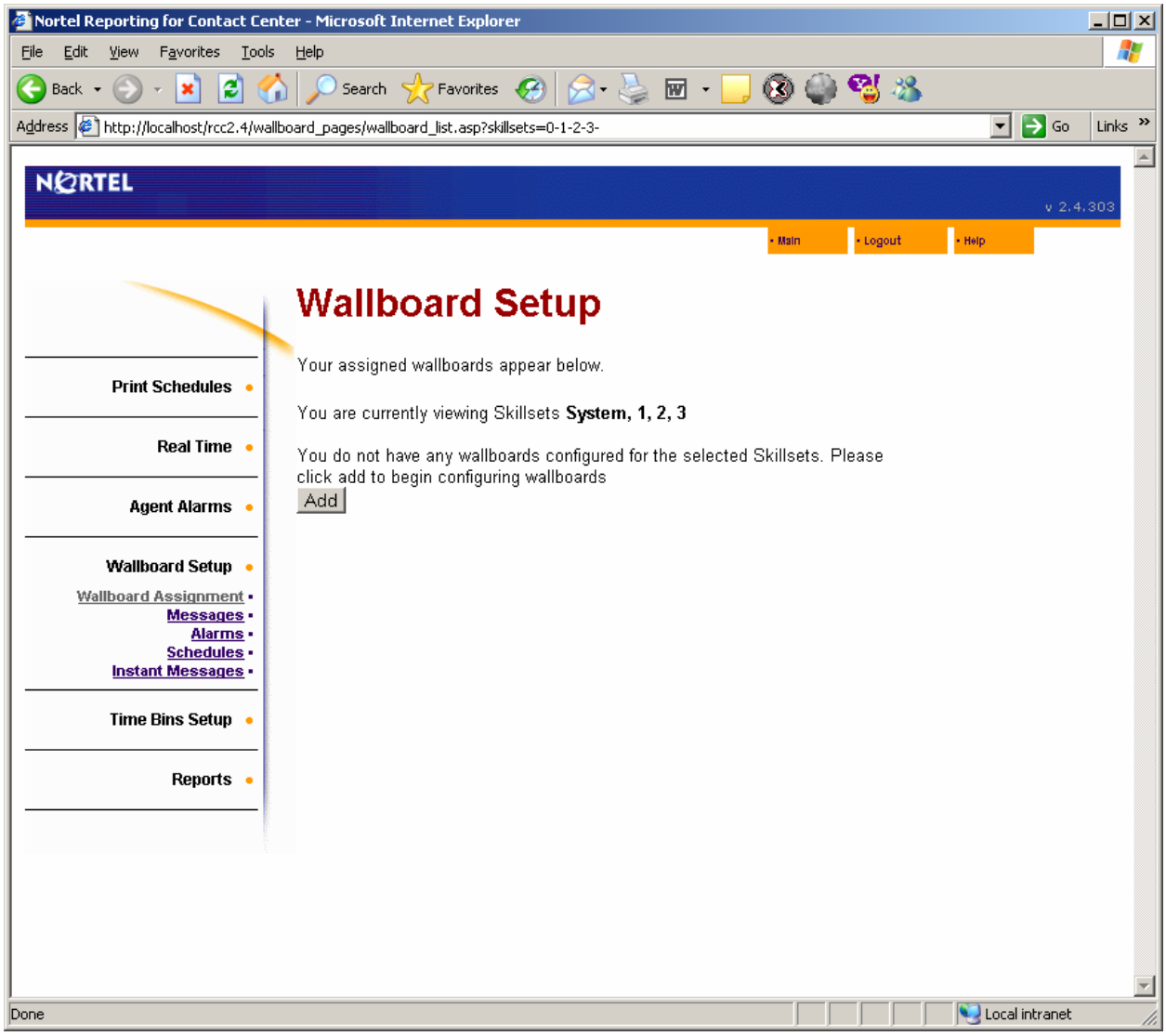


Figure 100: Wallboard Assignment page

You can delete wallboards or edit their settings.

In the example shown in Figure 100: Wallboard Assignment page, no wallboards are assigned to the selected Skillsets (in this example, System wallboards and wallboards for Skillsets 1, 2, and 3). In the example, User Mary Smith can only add wallboards.

Perform the following steps to add a wallboard:

1. Click **Add** to assign wallboards. The Add Wallboard page shown in Figure 101: Add Wallboard page appears.

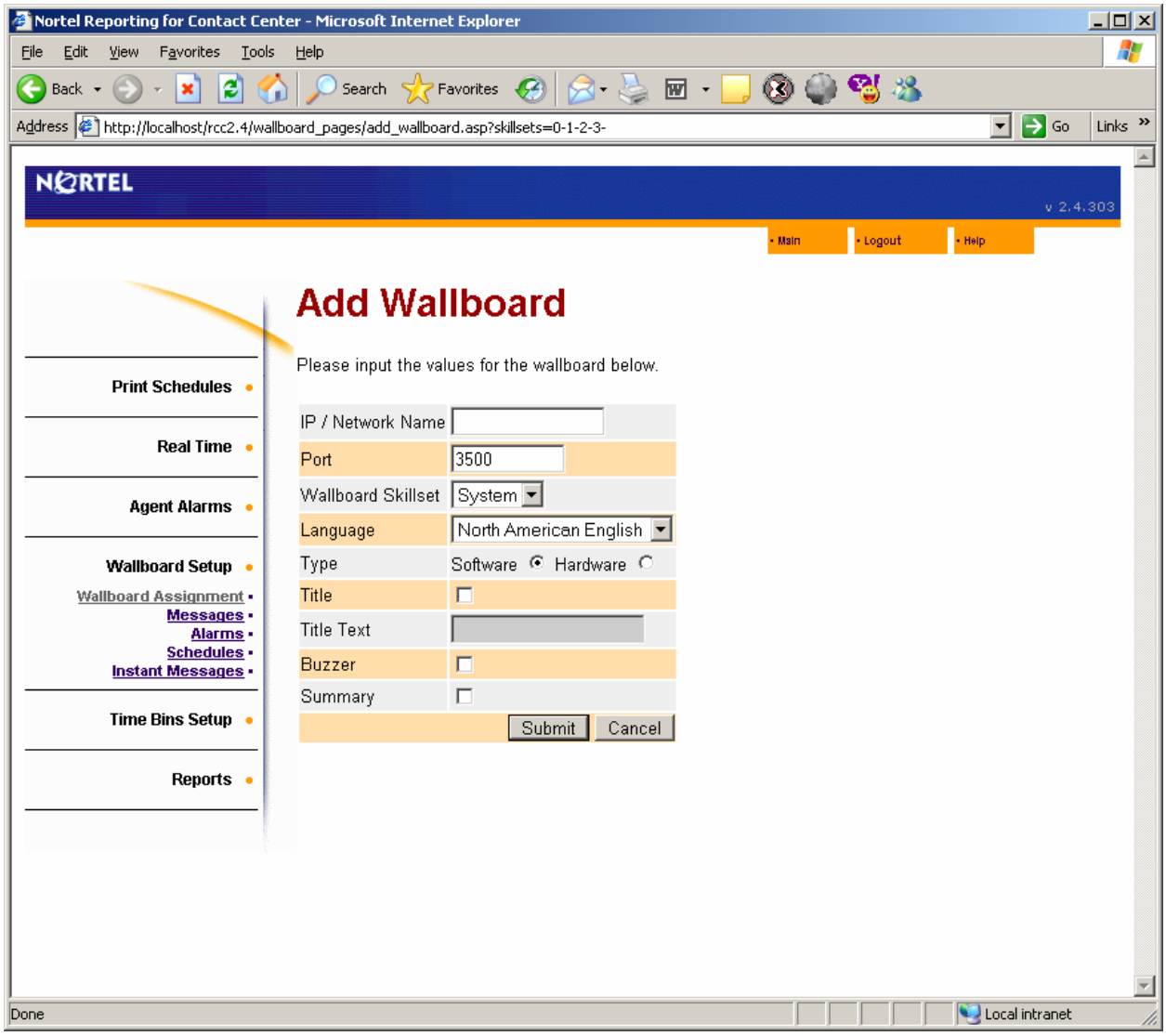


Figure 101: Add Wallboard page

2. In the **IP/Network Name** field, enter the IP Address or Network Name. (If the wallboard is an *ip***View** SoftBoard, enter the IP Address or the Network Name of the PC on which the SoftBoard will be running.)

3. The value in the **Port** is usually left at the default value of 3500. This value might be changed for an *ip***View** SoftBoard if an Agent wishes to have several copies of *ip***View** SoftBoard running on the same PC to, for example, display different Skillset statistics to a multi-Skillset Agent. Each copy of *ip***View** SoftBoard would be installed on the Agent's PC with a different Port number. In that case, the corresponding wallboard entry in Nortel Reporting for Contact Center must be configured with the appropriate port number.

4. The **Wallboard Skillset** selection specifies the Skillset the wallboard is to report on. That is, the named Skillset is the Skillset from which Nortel Reporting for Contact Center extracts the statistical information to display on the wallboard. If you wish to display system-wide totals (that is, to have the information displayed represent totals derived from all Skillsets) select **System** from the list.

In other words, assigning a wallboard to be a System wallboard causes Nortel Reporting for Contact Center to send statistics to that wallboard which represent the system totals. For example, the parameter **AN** (Agents Not Ready) on a System wallboard shows the total figure for the **AN** values of all Skillsets added together.

Notice that the only Skillsets available in this list are the ones that our example User Mary Smith was assigned by the Administrator.

5. In the **Language** list, select the language in which wallboard should be driven. Individual wallboards can be driven in any of the supported languages that appear in the list.

6. Select a **Type** option (Hardware or Software) to indicate whether the wallboard is a hardware wallboard or software wallboard (SoftBoard). Any of the available parameters can be used on either the hardware or the software wallboards.

   The parameter spacing on the hardware wallboard allows for the display of two 3-digit and one 4-digit parameter per line, giving six parameters in total. The two parameters at the right hand end of the wallboard can display up to 4 digits at a time.

   Those parameters that are able to reach 4 digits cannot be configured for the positions that can display only 3 digits. See Wallboard Parameters on page 140.

7. Select **Title** if the wallboard is to be configured with a title. A title is a string of text up to 16 characters in length, which is displayed on the top line of a hardware wallboard and above the parameter list on a SoftBoard. In both cases, the title reduces the number of parameters that can be displayed by the wallboard to 3.

8. If you selected **Title** in the previous step, enter the title in the **Title Text** field.

9. Select **Buzzer** if you want the wallboard to emit a short buzzing sound when a Summary Message or a Scrolling message is sent to it. If Buzzer is selected, you will also hear a buzzing sound when a parameter goes into alarm even if no Alarm Message is associated with the alarm (a static alarm).

10. Select **Summary** to send Hourly Summaries to the wallboard when each hour passes and when the Skillset enters Out Mode (that is, there are no Agents Logged In to the Skillset).

11. To save the changes, click **Submit**. The Wallboard Setup page appears, see Figure 102: Wallboard Setup page with wallboard listed. As shown in the figure, after you assign a wallboard, the wallboard appears on the page.

    To leave the Add Wallboard page without saving any changes, click **Cancel**. The Wallboard Setup page appears.

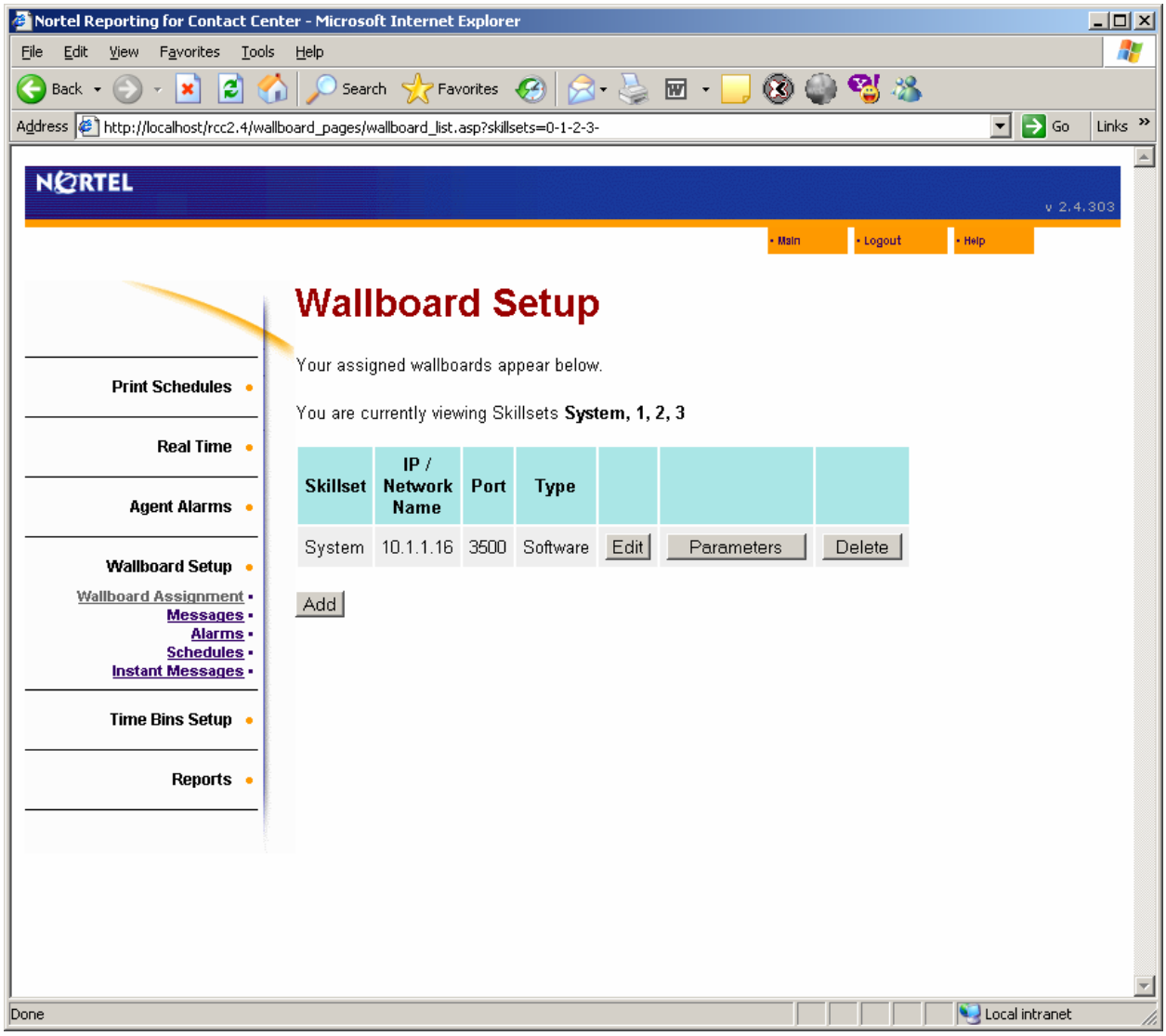


Figure 102: Wallboard Setup page with wallboard listed

Click **Edit** to view the Edit Wallboard page shown in Figure 103: Edit Wallboard page.

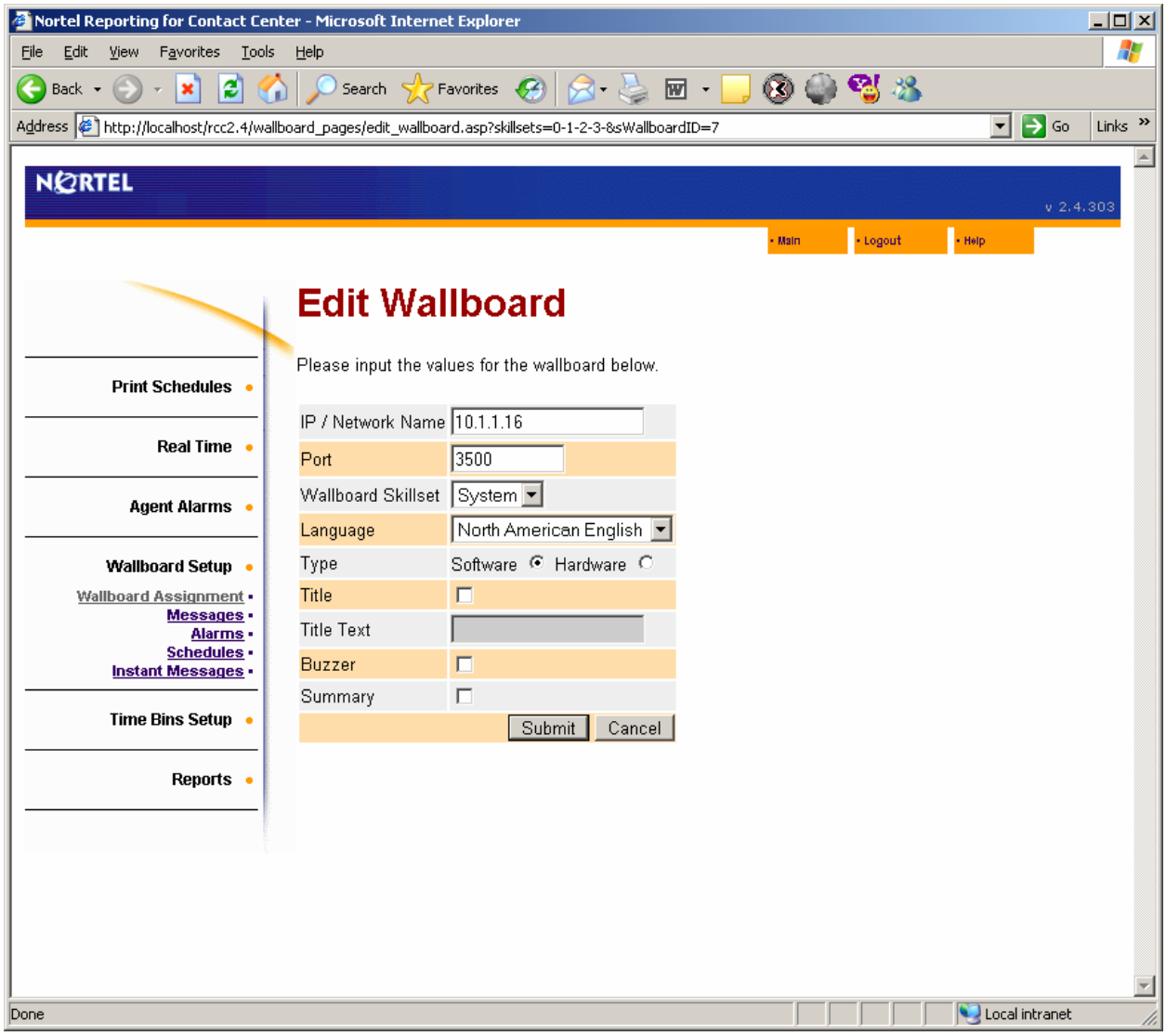


Figure 103: Edit Wallboard page

The Edit Wallboard page is set up exactly like the Add Wallboard page shown in Figure 101: Add Wallboard page, except the data fields are populated with the values of the wallboard you selected to edit.

To save the changes, click **Submit**. The Wallboard Setup page appears. See Figure 99: Wallboard Menu page.

To leave the Add Wallboard page without saving any changes, click **Cancel**. The Wallboard Setup page appears. See Figure 99: Wallboard Menu page.

Wallboard Parameters

To edit the parameters for a particular wallboard click the **Parameters** button in the Wallboard Setup page, as shown in Figure 102: Wallboard Setup page with wallboard listed. The Edit Parameters page will be displayed; see Figure 104: Edit Parameters page.

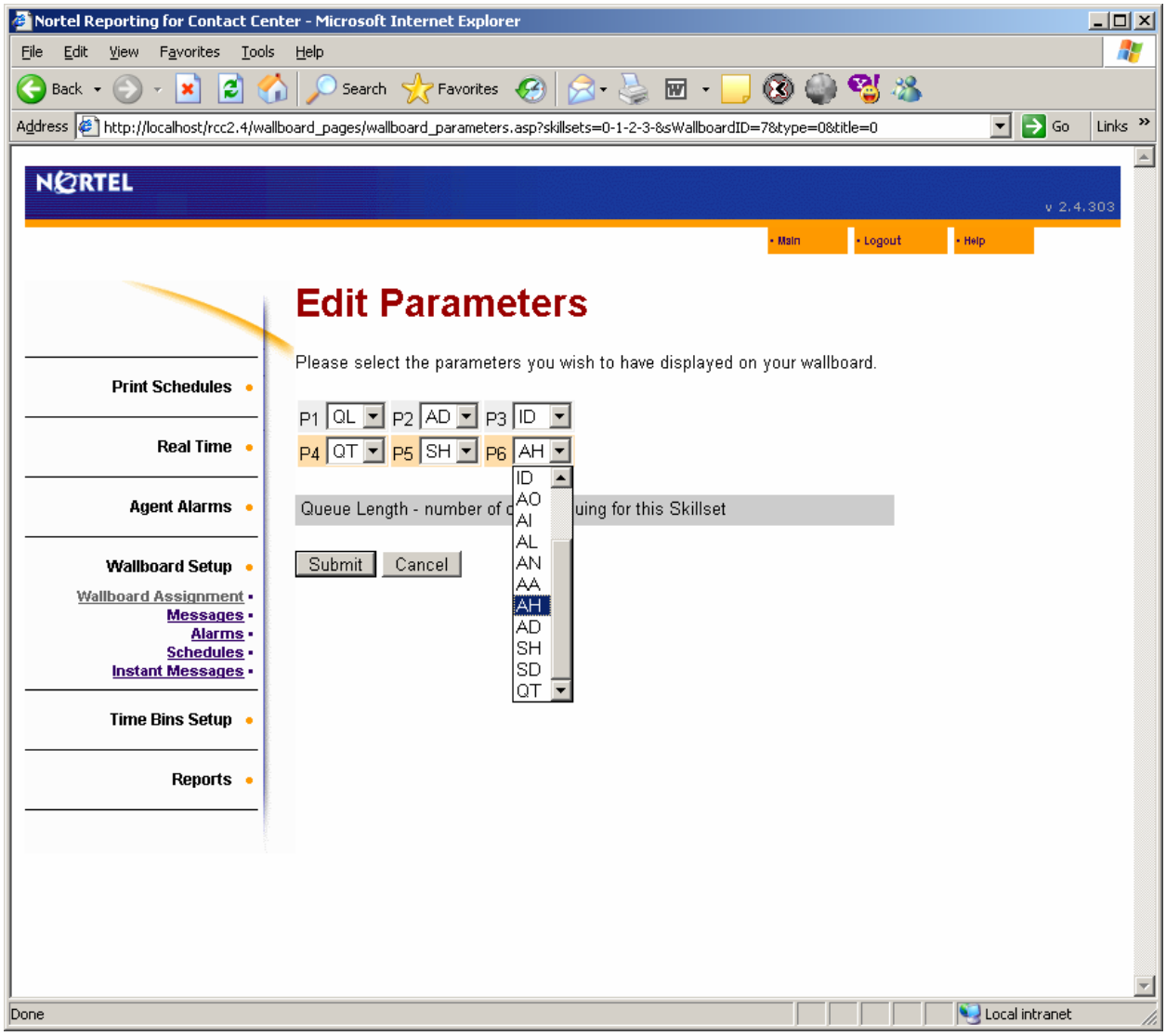


Figure 104: Edit Parameters page

The Edit Parameters page allows you to specify which six (or three, if you specified that the wallboard is going to have a title, as described on page 138) parameters are displayed on the wallboard.

The list of available parameters is shown on page 138. Select the parameters from the lists on the page.

Note: If the wallboard for which you are specifying parameters is a hardware wallboard, some parameters appear only in positions 3 and 6. The lists for positions 1, 2, 4, and 5 do not show those parameters because the parameters that are restricted to positions 3 and 6 are capable of displaying up to 4 digits. Positions 3 and 6 on the hardware wallboard are larger than positions 1, 2, 4, and 5. Any parameter can occupy any position on a software wallboard.

When you have selected your parameters, click **Submit**. The Wallboard Setup page appears. See Figure 99: Wallboard Menu page.

To return to the Wallboard Setup page without saving any changes, click **Cancel**. You are prompted to confirm that you do not wish to save your changes.

Click **Delete** to remove the wallboard definition from the system and to remove its listing from the Wallboard Setup page.

You are prompted to confirm the deletion. After you confirm the deletion, the Wallboard Setup page appears. See Figure 99: Wallboard Menu page.

Messages

The Messages option allows you to create and store messages that can be used as Alarm or Scheduled messages.

From the **Wallboard Setup** menu select **Messages** to view the Assigned Messages page shown in Figure 105: Assigned Messages page. This page lists all the messages that are configured. Any message can be used by any Skillset.

Initially, the list of Assigned Messages is empty (as shown in the figure).

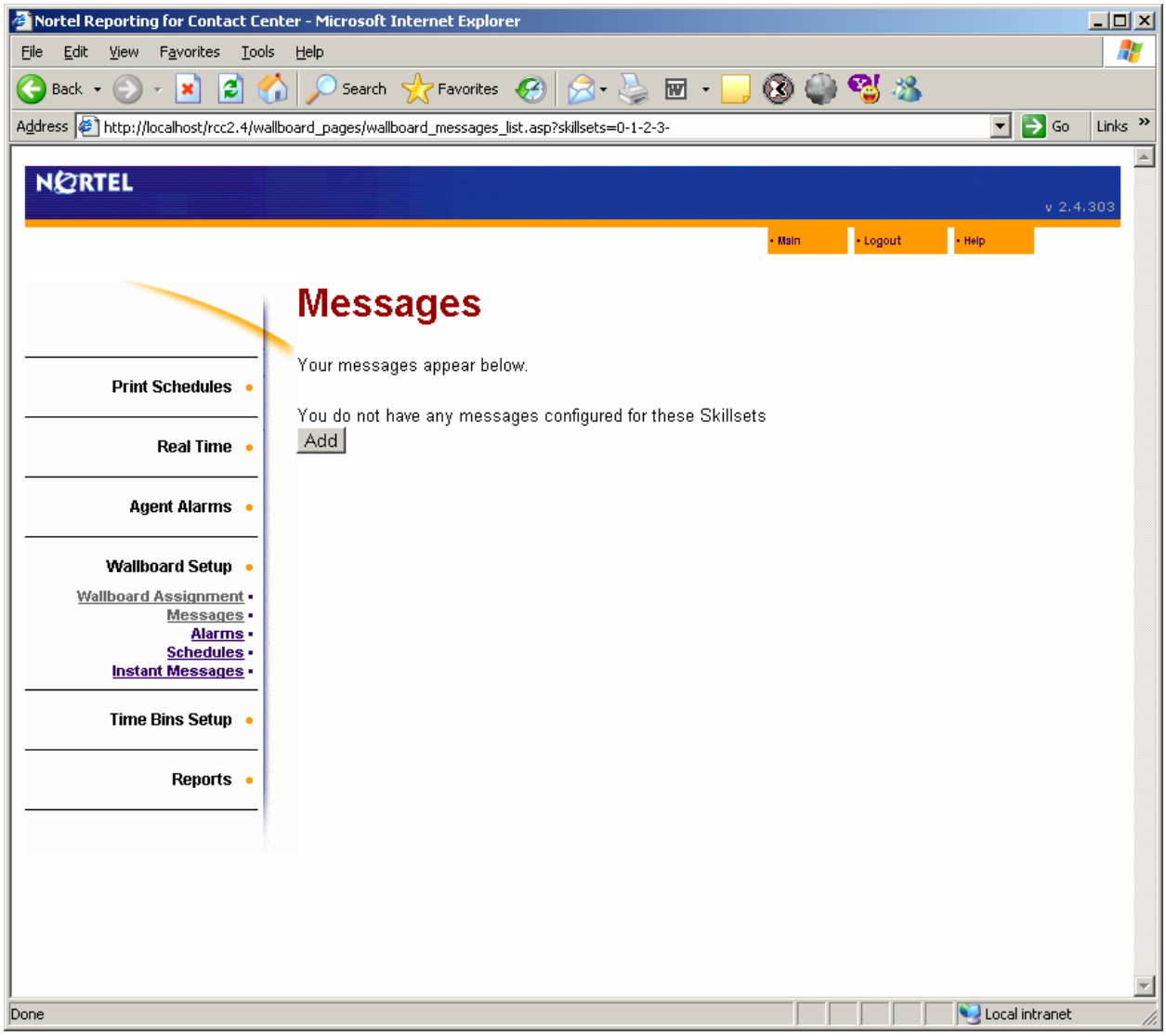


Figure 105: Assigned Messages page

Click **Add** to view the Add Messages page shown in Figure 106: Add Message page.

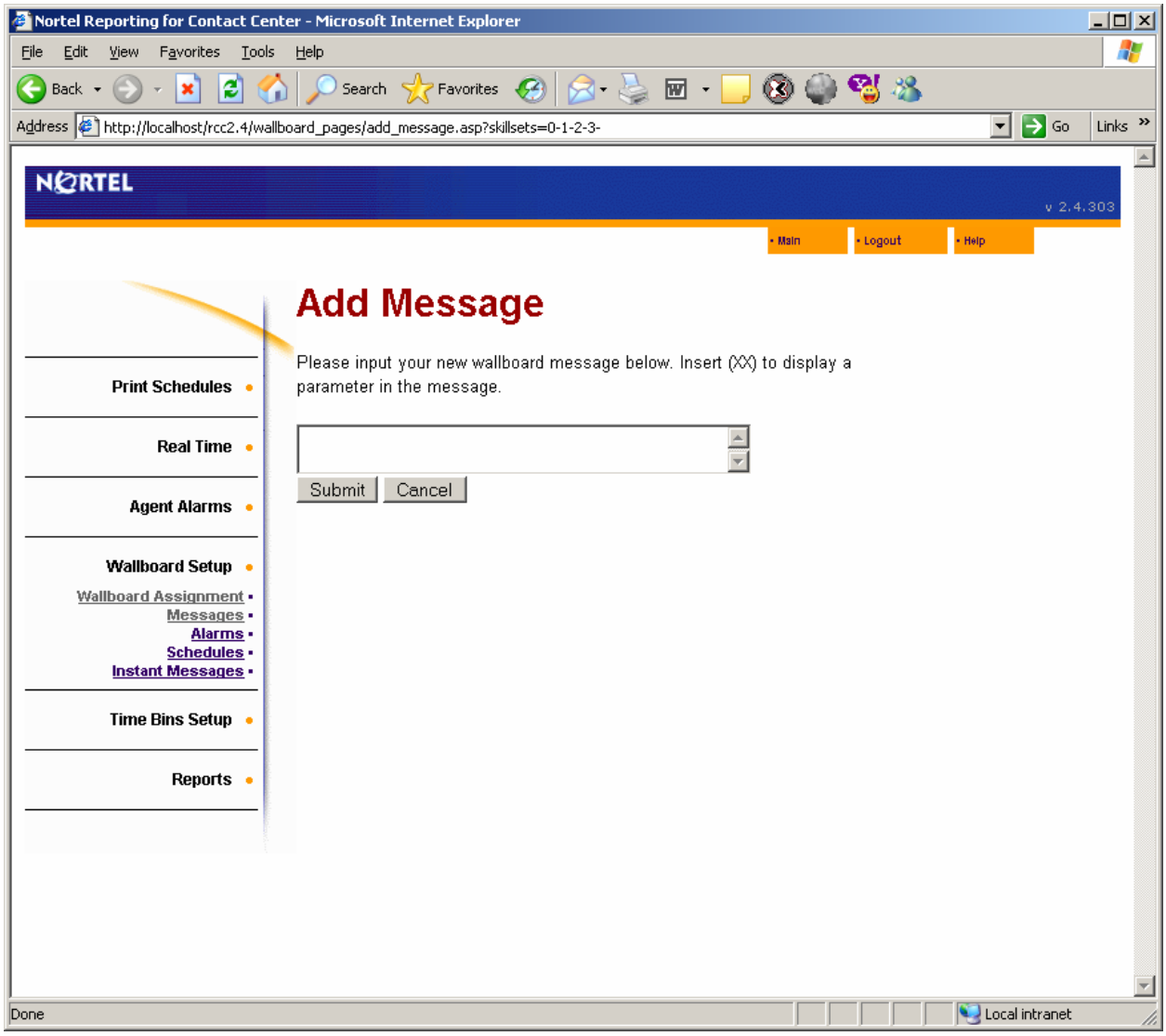


Figure 106: Add Message page

Type your message text in the blank field.

Note that if you include a parameter abbreviation in round brackets **(** and **)** in the text of the message, the appropriate numerical value of that Contact Center statistic replaces the parameter abbreviation when the message is displayed.

See the list of available parameters on page 138, and the discussion of parameter abbreviations being replaced with numerical values on page 133.

Figure 107: Add Message page – example text shows an Add Message page with a message example.

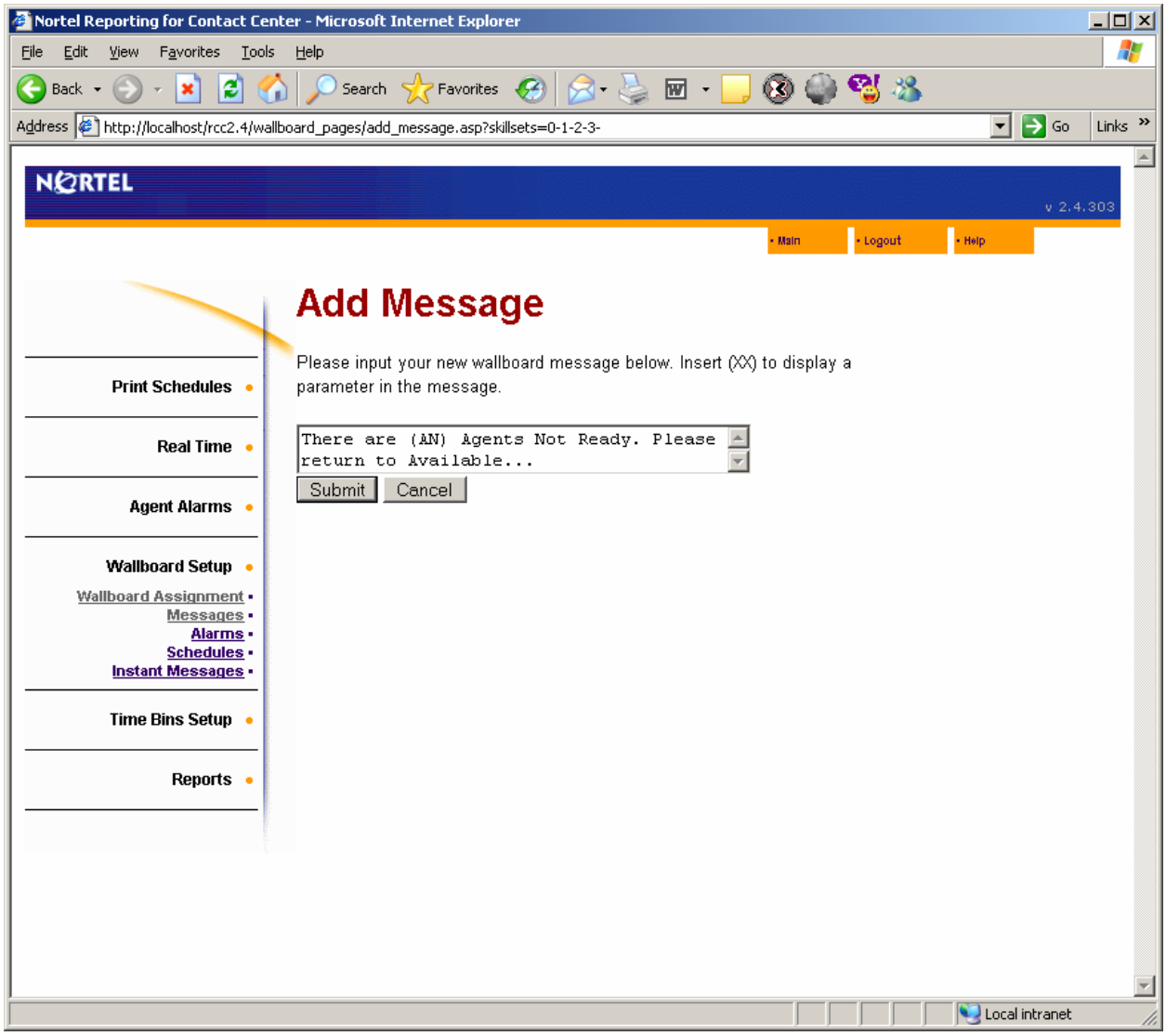


Figure 107: Add Message page – example text

In the example, User Mary Smith entered the following message in the Add Message text field:

There are (AN) Agents Not Ready please return to available

The parameter abbreviation AN represents Agents Not Ready. When this message is displayed on a wallboard the current numerical value of AN is inserted in the message instead of the (AN) symbol.

If there are 6 Agents Not Ready at the time the message was displayed on the wallboard, the following text is displayed:

There are 6 Agents Not Ready please return to available

Click **Submit** to save the message text you typed. The Assigned Messages page shown in Figure 108: Assigned Messages List – Example Messages appears.

To leave the Add Messages page without saving any changes, click **Cancel**. The Assigned Messages page shown in Figure 108: Assigned Messages List – Example Messages appears.

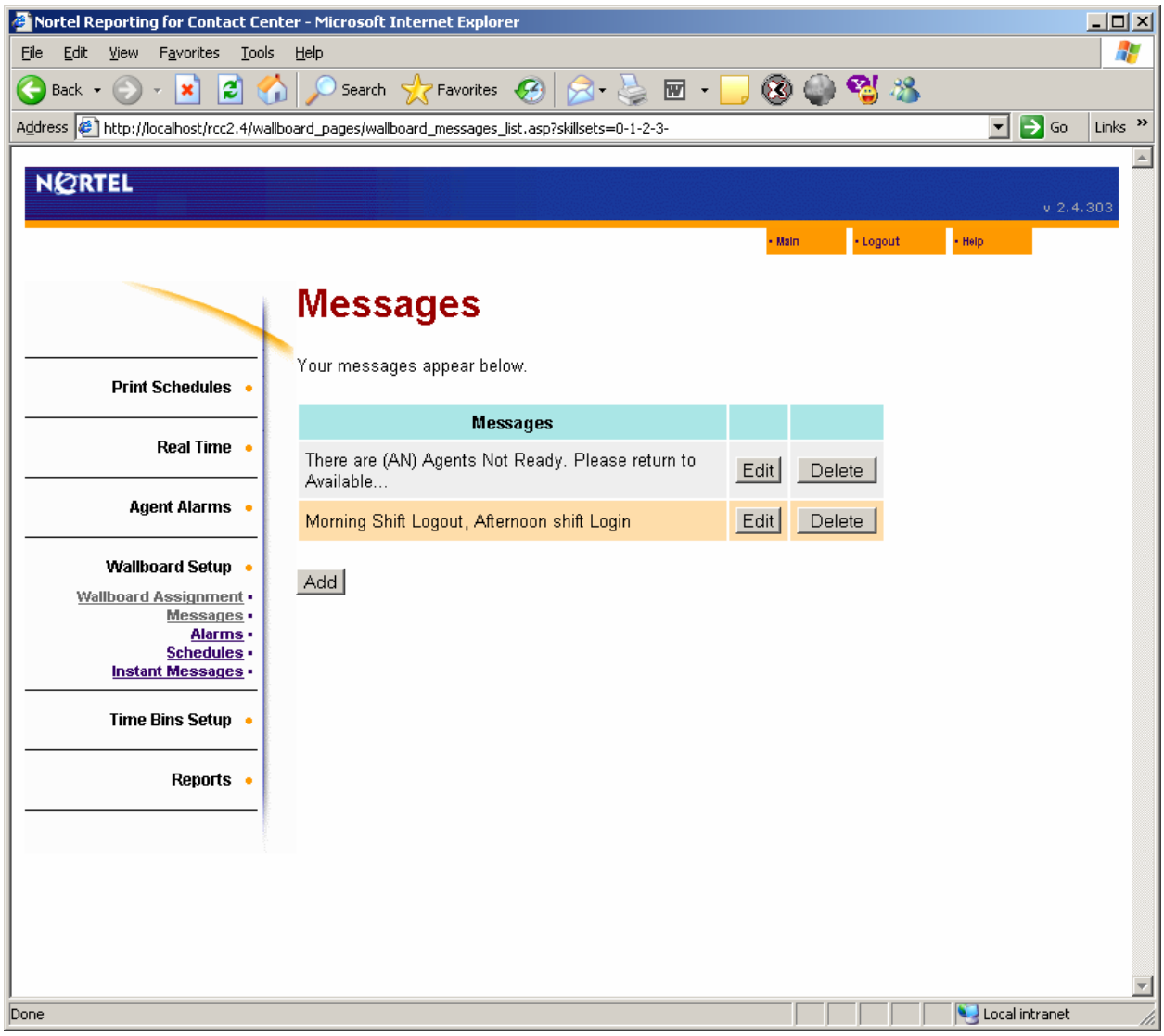


Figure 108: Assigned Messages List – Example Messages

User Mary Smith clicked **Submit** to save her new message. Her Assigned Messages List now includes the message she saved, as shown in the example.

Mary Smith also entered a message that will be used in a schedule. This message is a text message only and does not include any parameter abbreviations. This message will be use later in a Schedule.

The text of the other message is:

Morning Shift Logout, Afternoon shift Login

After messages are assigned to these Skillsets, they can be used in Alarms or Schedules.

You can use the **Edit** button to edit the details of a Message, and you can use the **Delete** button to remove a message from the list.

Alarms

Select the Wallboard Setup **Alarm** option to view the Assigned Alarms page shown in Figure 109: Assigned Alarms page.

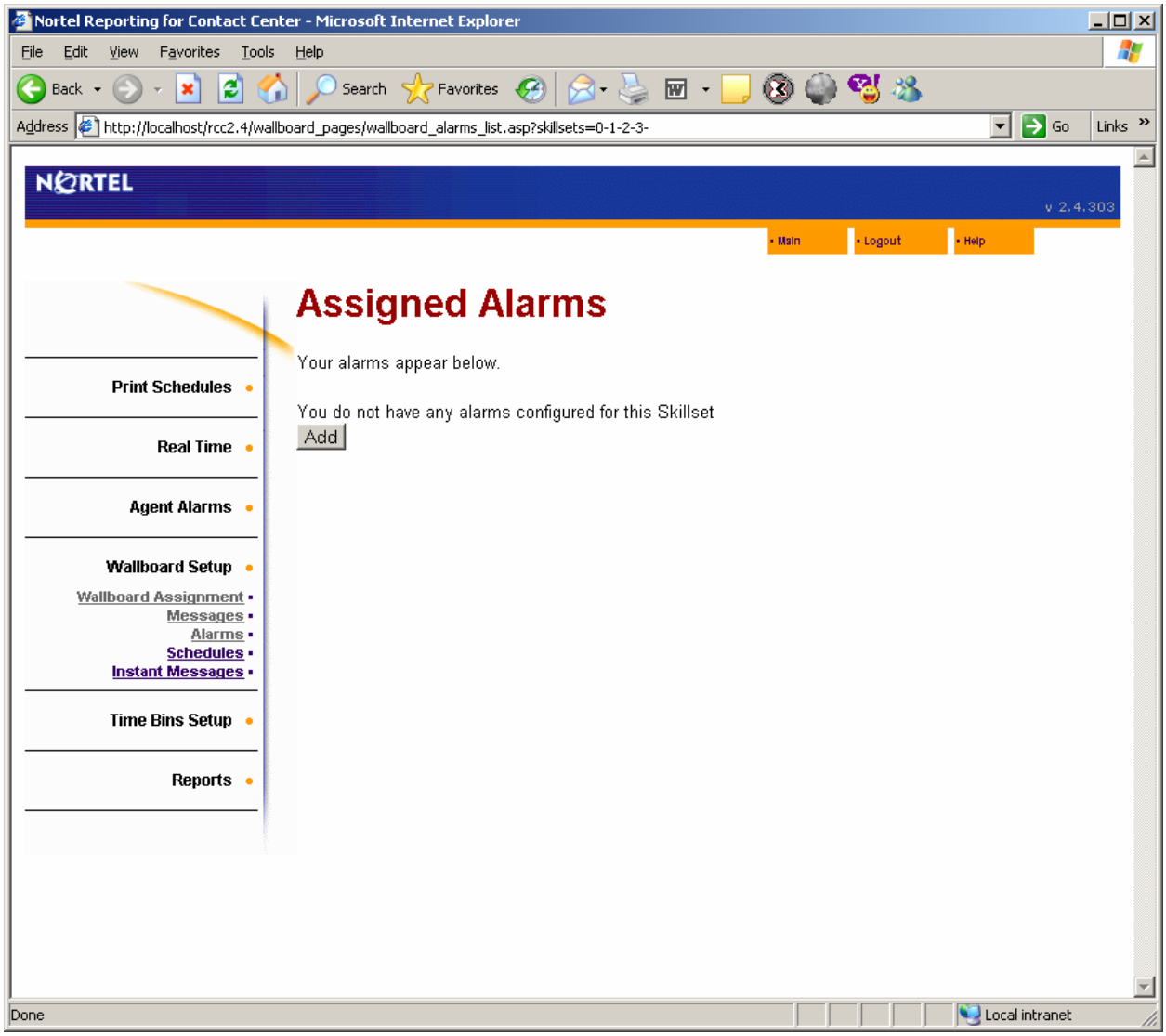


Figure 109: Assigned Alarms page

The Assigned Alarms list is empty initially.

To create an Alarm, click **Add**. The Add Alarm page shown in Figure 110: Add Alarm page appears.

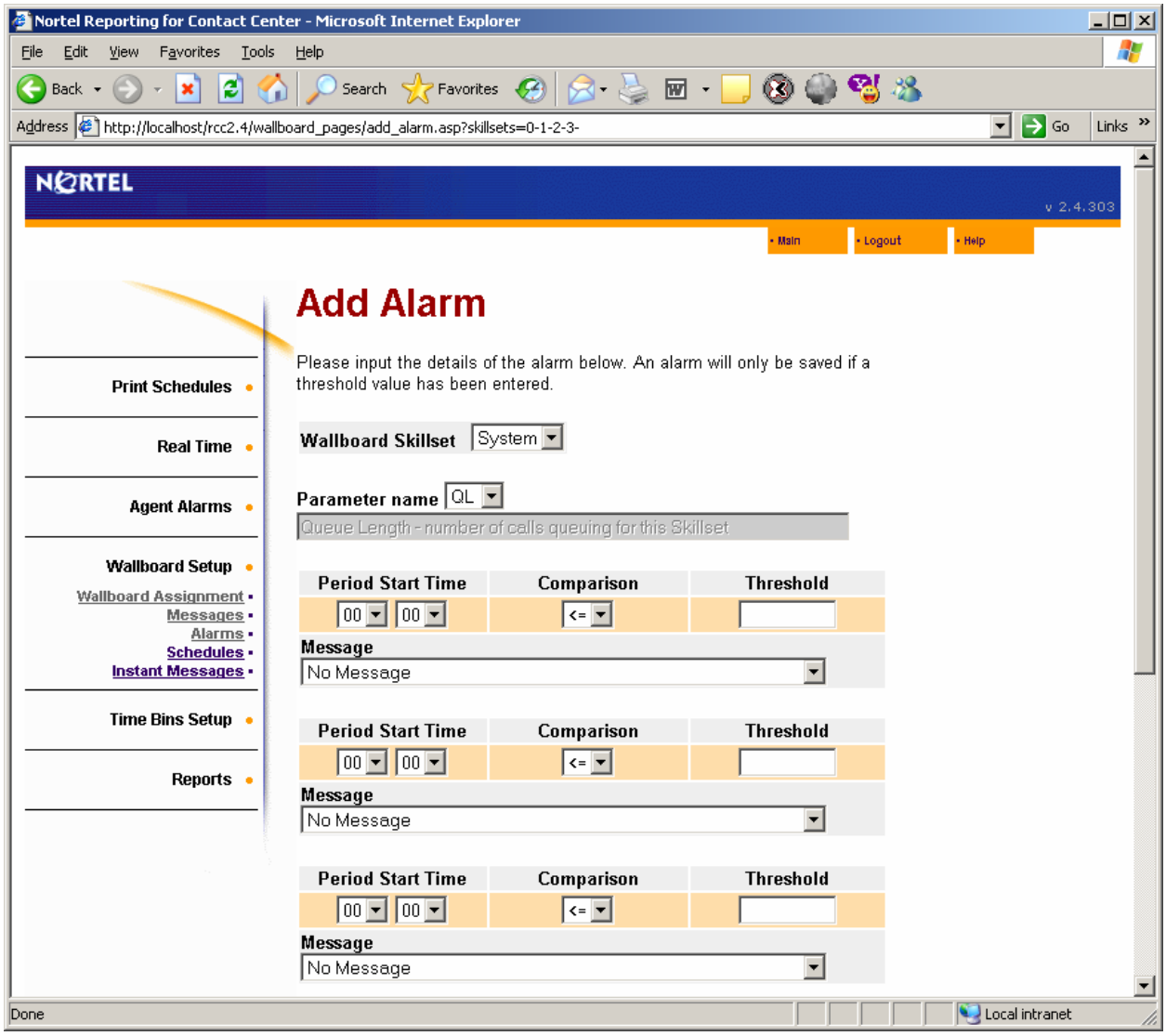


Figure 110: Add Alarm page

Follow these steps to specify an alarm:

1. In the **Wallboard Skillset** list, select a skillset that is specific to the alarm.

   Note: When you assign an Alarm, the alarm is specific to a particular Skillset (or the System, if you select the System list item). An *Alarm Message* can be used by many Skillsets, but an *Alarm* is specific to a single Skillset.

2. In the **Parameter name** list, select the alarm parameter that triggers the alarm. Refer to the list of available parameters on page 138.

   Note: You can specify the same alarm conditions for different Skillsets, and these different alarms can use the same Alarm message, but they are separate and distinct alarms, and they must be created separately.

   Note: If you configure an Alarm to be a System Alarm, the Alarm appears on all wallboards that have been configured as System wallboards. You can specify the same

alarm conditions for different Skillsets, and these different alarms can use the same Alarm message, but they are separate and distinct alarms, and they operate independently, with no interaction.

3. In the **Period Start Time** list, specify the start time for the period of the day in which the Alarm is operational. For more information, refer to Alarm Periods.

   Note: Alarm Periods allow you to specify different Thresholds, Comparisons, and Messages for different periods of the day, for a single Alarm. An Alarm period is in operation after its start time has passed and before the start time of the next period has been reached.

   You can specify different Alarm conditions for a single Alarm for up to six Alarm Periods throughout a single day. To define an Alarm Period, specify the start time for that period.

   If only one Alarm Period is configured, that Alarm Period is in operation 24 hours a day.

4. In the **Comparison** list, select the type of comparison that determines if the alarm condition is triggered. The types of comparisons are as follows:

   <= Less than or equal to. Use this type of comparison to monitor a parameter against some lower limit. That is, you wish to be informed if the parameter value ever drops to or decreases below the Threshold you supply. For example if you wish an alarm to be triggered if the Grade of Service for the Current Hour (SH) falls below 50, you would use SH <= 50.

   = Equals. Use this type of comparison to monitor a parameter against an exact figure. That is, you wish to be informed if the parameter value ever exactly matches a figure, perhaps a target. Note that in this type of comparison, if the parameter value is higher than the threshold, the alarm condition is not triggered. The parameter must exactly match the threshold in order to trigger the alarm. For example, you may wish to have a congratulatory message sent to the wallboards if you exceed your highest number of incoming calls for the day. If your highest number of incoming calls for the day was 1200, you could set an Alarm for the parameter ID. However, if you use ">= ", the Alarm would be triggered for each and every call from 1200 on. Instead, you would use the format ID = 1201. This means that the alarm message will be sent *only* when the number of incoming calls in the day equals 1201 (one higher than your previous highest total). This avoids the message being repeatedly sent as calls continue to come in and the ID figure rise. (At the end of that day, you would then note your n highest ID figure and edit the Alarm to reflect your new record Incoming Calls in the Day total.)

   >= Greater than or equals to. Use this type of comparison to monitor a parameter against some upper limit. That is, you wish to be informed if the parameter value ever meets the Threshold you supply. For example, if you wish an alarm to be triggered if the number of Agents who have made themselves Not Ready rises above 4, you would use AN >= 4.

5. In the **Threshold** field, enter a numerical threshold against which the parameter value is compared. Nortel Reporting for Contact Center automatically understands whether the figure you supply represents:

   - Agents (for parameters such as AN and AO)
   - Calls (for parameters such as ID and OD)
   - Seconds (for parameters such as QT)
   - Percentages (for parameters such as SD)

6. In the **Message** list, select the message that is sent when the alarm is triggered.

   Note: A Static Alarm does not have an alarm message. In the case of a Static Alarm, the parameter value is displayed in flashing red on the wallboard. For this type of Alarm to be effective, the parameter must be one of the parameters you chose to have displayed on your wallboard (see Parameters Button on page 140). To specify a Static Alarm, select **No Message** from the Message list.

Alarm Periods

You can specify different Alarm conditions for a single Alarm for up to six Alarm Periods throughout a single day. You define the Alarm Periods by specifying start times for each period.
Alarm Periods allow you to specify different Thresholds, Comparisons, and Messages for different periods of the day, for a single Alarm. An Alarm period is in operation when its start time has passed and before the start time of the next period has been reached.

Note: If only one Alarm Period is configured, then that Alarm Period is in operation 24 hours a day.

In the example shown in Figure 111: Example Settings for a Multi Alarm Period Alarm, User Mary Smith configured an Alarm with three time periods for one of her Skillsets.

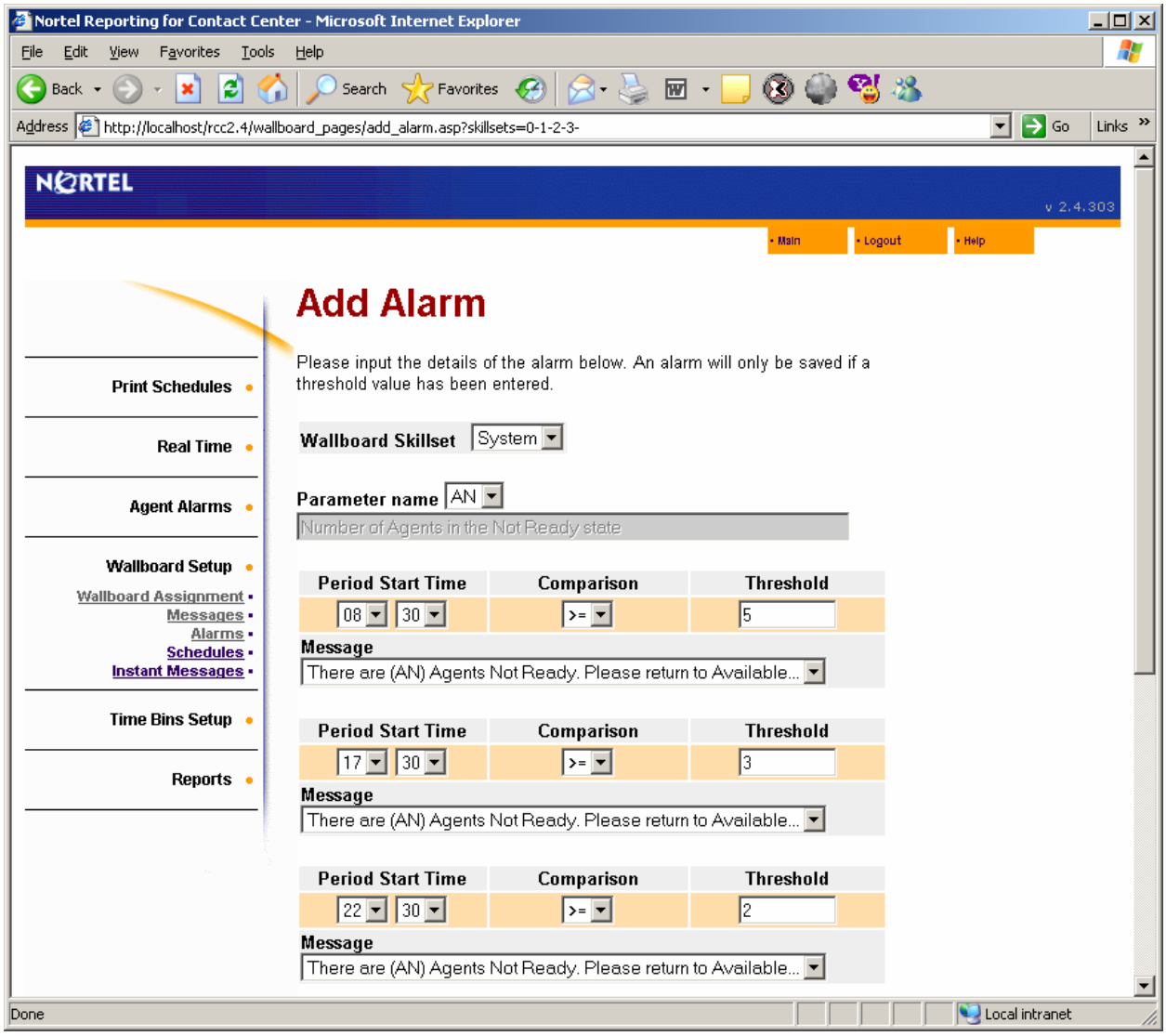


Figure 111: Example Settings for a Multi Alarm Period Alarm

The Alarm is triggered when the parameter AN (number of Agents Not ready) passes beyond the thresholds.

The Skillset applies to three shifts of Agents: a morning shift, the evening shift, and the late shift, which consists of a smaller number of Agents.

Because the Skillset has a different number of Agents Logged in during each shift, an Alarm based on Agents Not ready must have different thresholds to allow for the different numbers of Agents Logged in at the various periods throughout the 24-hour cycle.

In the example shown in Figure 111: Example Settings for a Multi Alarm Period Alarm, the first Alarm Period begins at 08:30 in the morning. The comparison is >=, so the Alarm is triggered when the AN parameter meets or exceeds the threshold. The threshold is **5**. When the AN parameter reaches 5 or above, the selected message is sent to the wallboards that are assigned to this Skillset.

The second Alarm Period begins at 17:30 in the evening. The comparison is >=, so the Alarm is triggered when the AN parameter meets or exceeds the threshold. The threshold is **3**. When the AN parameter reaches 3 or above, the selected message is sent to the wallboards that are assigned to this Skillset. Because there are fewer Agents in the Afternoon Shift, the threshold is lowered to 3.

The third Alarm Period begins at 22:30. Note that this Alarm Period operates until the next Alarm Period starts, which in this example is Alarm Period One, at 08:30 the following morning. Because of the smaller staff in Mary Smith's Skillset during the late shift, the Threshold is lowered to 2.

In all cases, the same Alarm Message is used. Because the (AN) symbol is replaced by the appropriate value of the AN parameter when the message is displayed (which is when the Alarm is triggered), a single message can be flexible enough to be used in different situations.

However, if Mary Smith wants to, she can use a different message for each Alarm Period, or she can configure any of the Alarm Periods to use a Static Alarm.

7. Click **Submit** to save your settings. The Assigned Alarms page shown in Figure 112: Assigned Alarms page with an Alarm configured appears. Click **Cancel** to view the Assigned Alarms page without saving your changes.

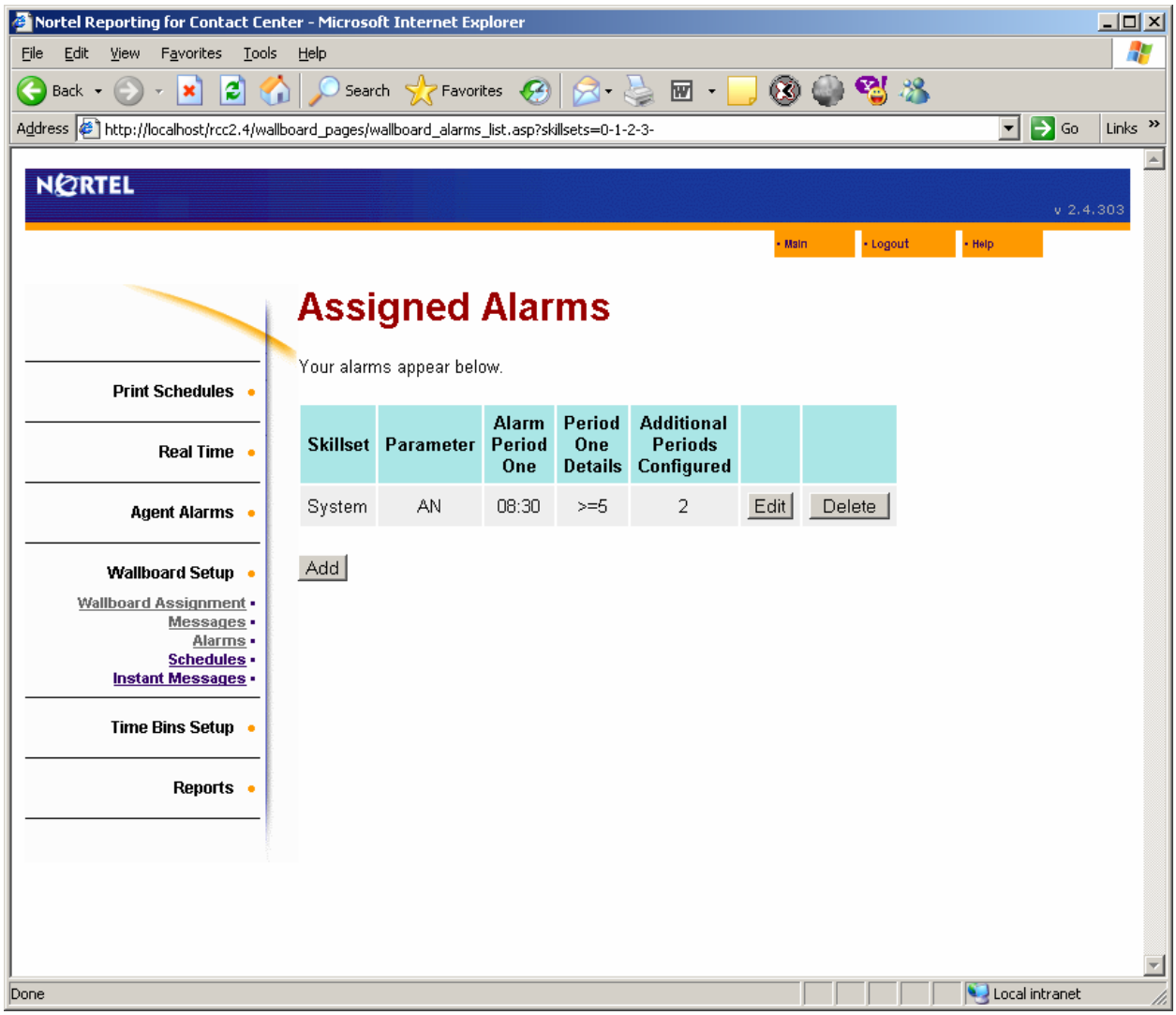


Figure 112: Assigned Alarms page with an Alarm configured

Schedules

Schedules allow you to automatically send a message to the wallboards of a Skillset (or the System) at a pre-defined time on a specified day or range of days.

Select the Wallboard Setup **Schedule** option to view the Assigned Schedules page shown in Figure 113: Assigned Schedules page.

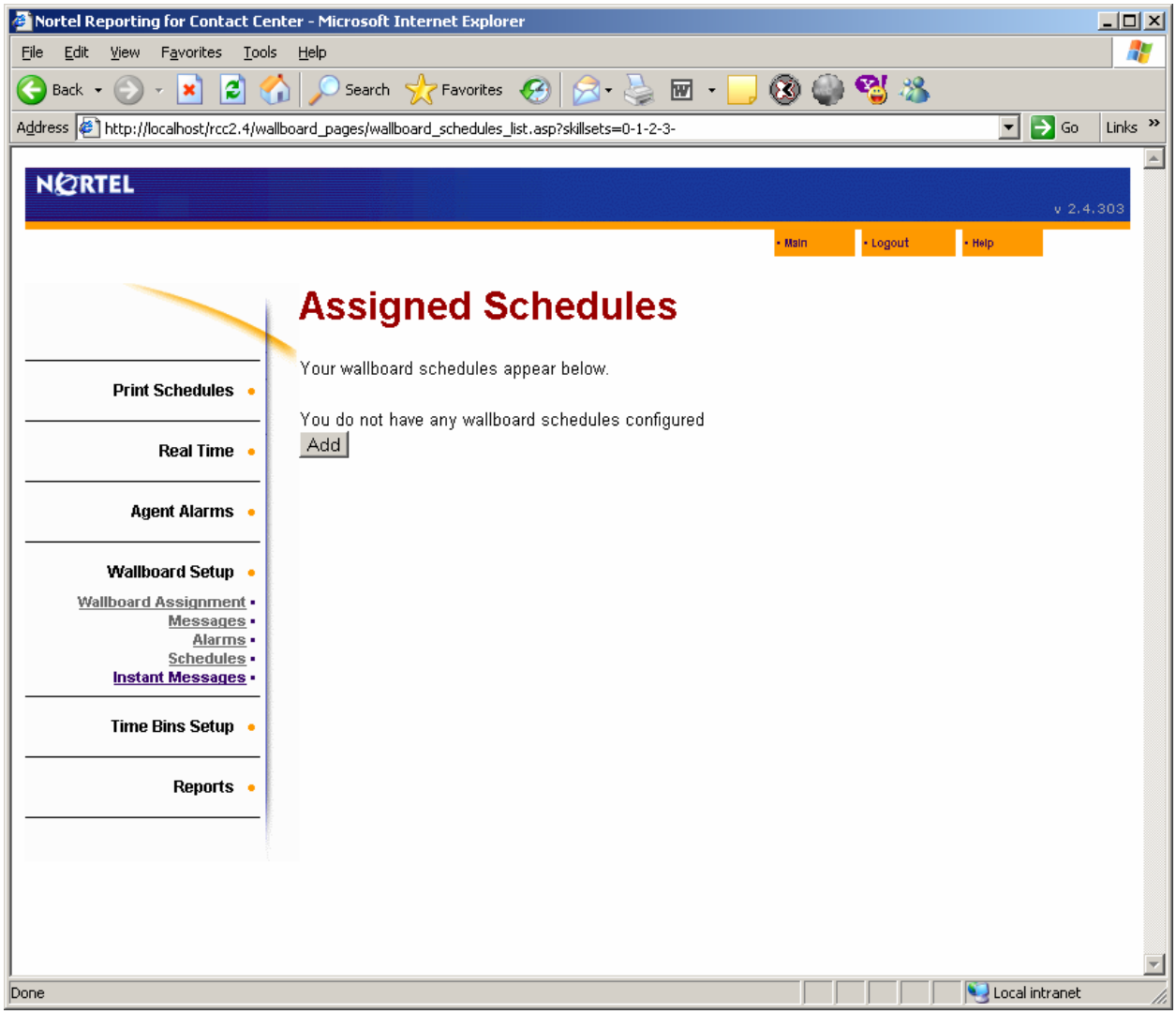


Figure 113: Assigned Schedules page

The Assigned Schedules page displays a list of the assigned Schedules. Initially, this list is empty.

Click **Add** to create a new Schedule. The Add Schedule page shown in Figure 114: Add Schedule page appears.

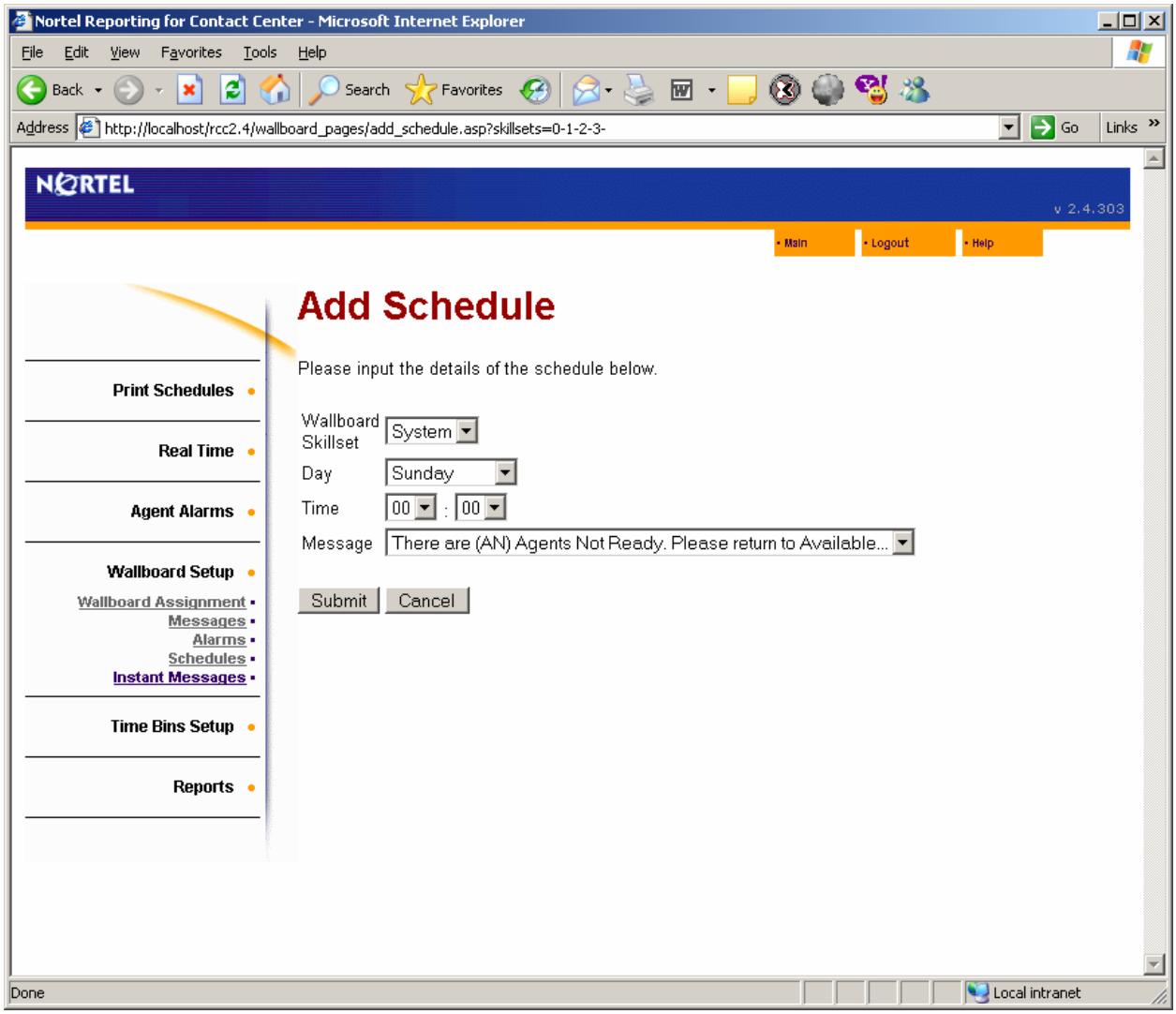


Figure 114: Add Schedule page

Follow these steps to configure the Schedule:

1. In the **Wallboard Skillset** list, select a skillset that is specific to the schedule.

   Note: When you add a schedule, the alarm is specific to a particular Skillset (or the System, if you select the System list item). A *Schedule Message* can be used by many Skillsets, but a *Schedule* is specific to a single Skillset.

.

   Note: If you configure a Schedule to be a System Schedule, that Schedule appears on all wallboards that are configured as System wallboards.

   Note: You can specify the same Schedule settings for different Skillsets, and these different Schedules can use the same Schedule message, but they are all separate and distinct Schedules, and they must be created separately.

2. From the **Day** list, select the day on which the Schedule operates. You can set a Schedule to operate on a specific day of the week, every day from Monday to Friday, every day from Monday to Saturday, or Daily (every day).
3. From the Time list, select the time, in hours and minutes, that the Schedule is triggered.

Note: The Time list uses the 24-hour clock.

Our example User Mary Smith has created a schedule which will operate on each day of the working week, Monday to Friday

4. From the **Message** list, select the message to send at the specified time on the specified range of days. The list includes all messages that are assigned to this skillset.
5. Click **Submit** to save your changes. The Assigned Schedules page shown in Figure 115: Assigned Schedules page with Schedule added appears. Click **Cancel** to leave the Add Schedules page without saving your changes.

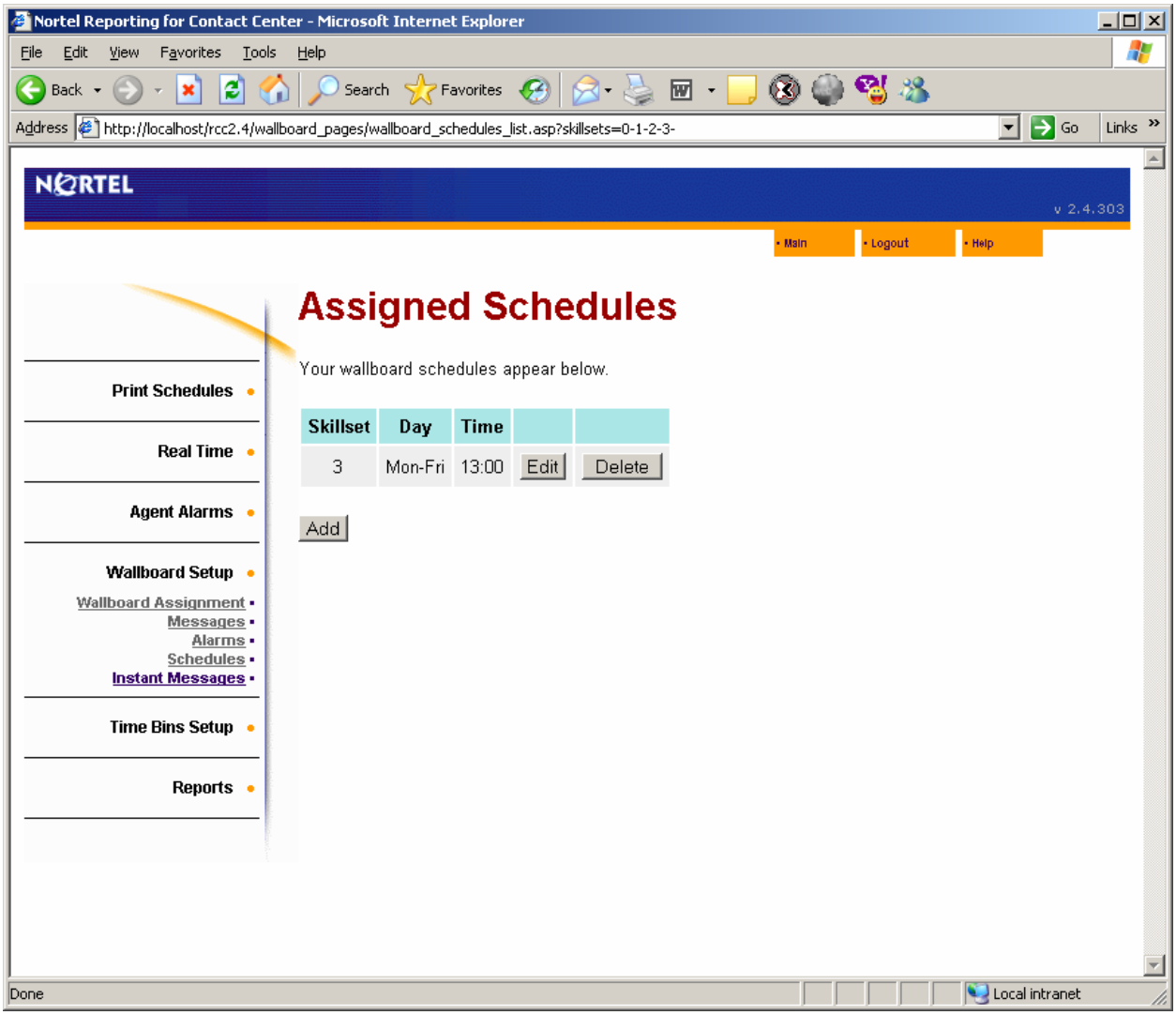


Figure 115: Assigned Schedules page with Schedule added

The example Assigned Schedules page shows the newly created Schedule. As shown in the example, Mary Smith wants the “Morning Shift Log Out, Afternoon Shift Login” message sent to the Skillset 3 wallboards at 13:00, each day of her working week, which runs from Monday to Friday.

Click **Edit** to change any details of a Schedule. The Edit Schedule page shown in Figure 116: Edit Schedule page appears.

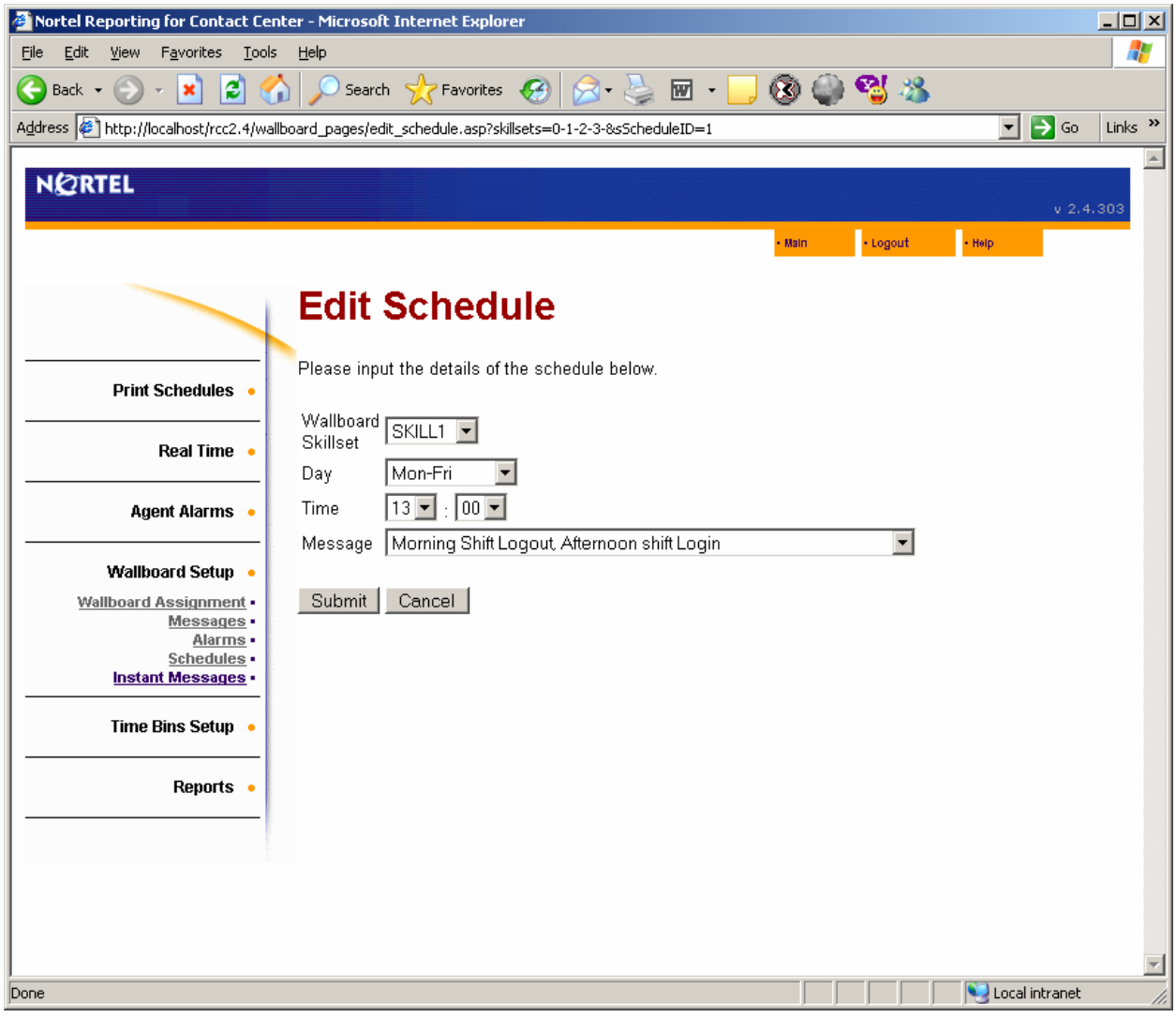


Figure 116: Edit Schedule page

This Edit Schedule page is set up exactly like the Add Schedule page shown in Figure 114: Add Schedule page.

Click **Submit** to save your edits. The Assigned Schedule page shown in Figure 115: Assigned Schedules page with Schedule added appears.

Click **Cancel** to leave the Edit Schedules page without saving any edits. The Assigned Schedule page shown in Figure 115: Assigned Schedules page with Schedule added appears.

Instant Messages

Instant messages allow Users to manually select any one of the stored wallboard messages and to send them to the wallboards at will.

Users can also type any text and have it sent to the wallboards, for one-off requirements. These messages are sent to the wallboards and then discarded. They are not saved. If you wish to save a message, use the Wallboard Message options on page 142 to add the message to the list of stored messages.

Select Wallboard Setup **Instant Messages** option to view the Instant Messages page shown in Figure 117: Instant Messages page.

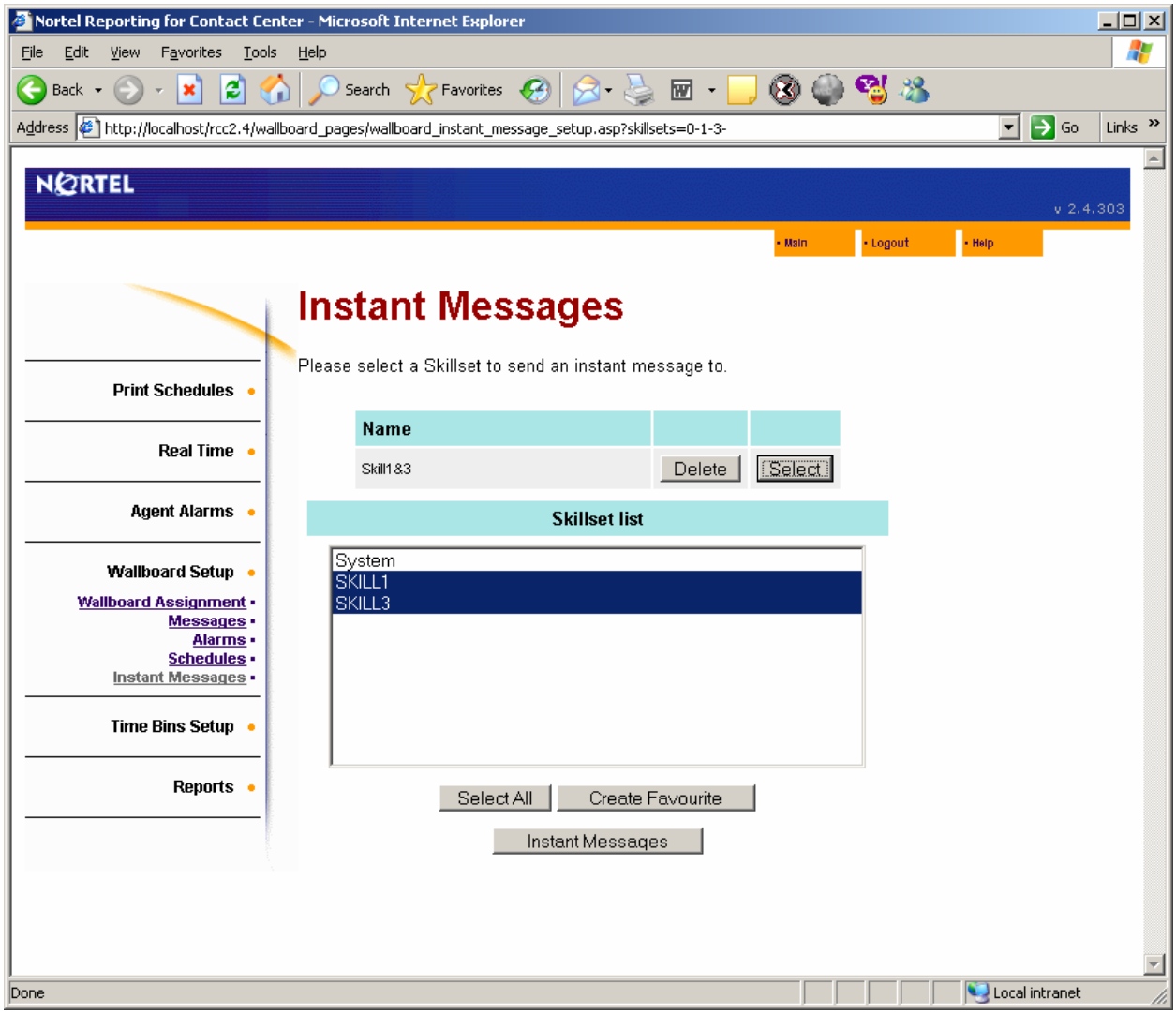


Figure 117: Instant Messages page

From the Instant Messages page, you can select the Skillsets to which you wish to dispatch the instant message. The available Skillsets are those that your Administrator assigned to you.

- For more information about using Skillset selection lists see page 92.
- For more information about using Favorites, see page 92.

In the example shown in Figure 117: Instant Messages page, User Mary Smith used her Skill1&3 Favorite to select the Development and Training Skillsets.

Click **Instant Messages** to view the Instant messages page that allows you to compose an instant message. See Figure 118: Composing an Instant Message.

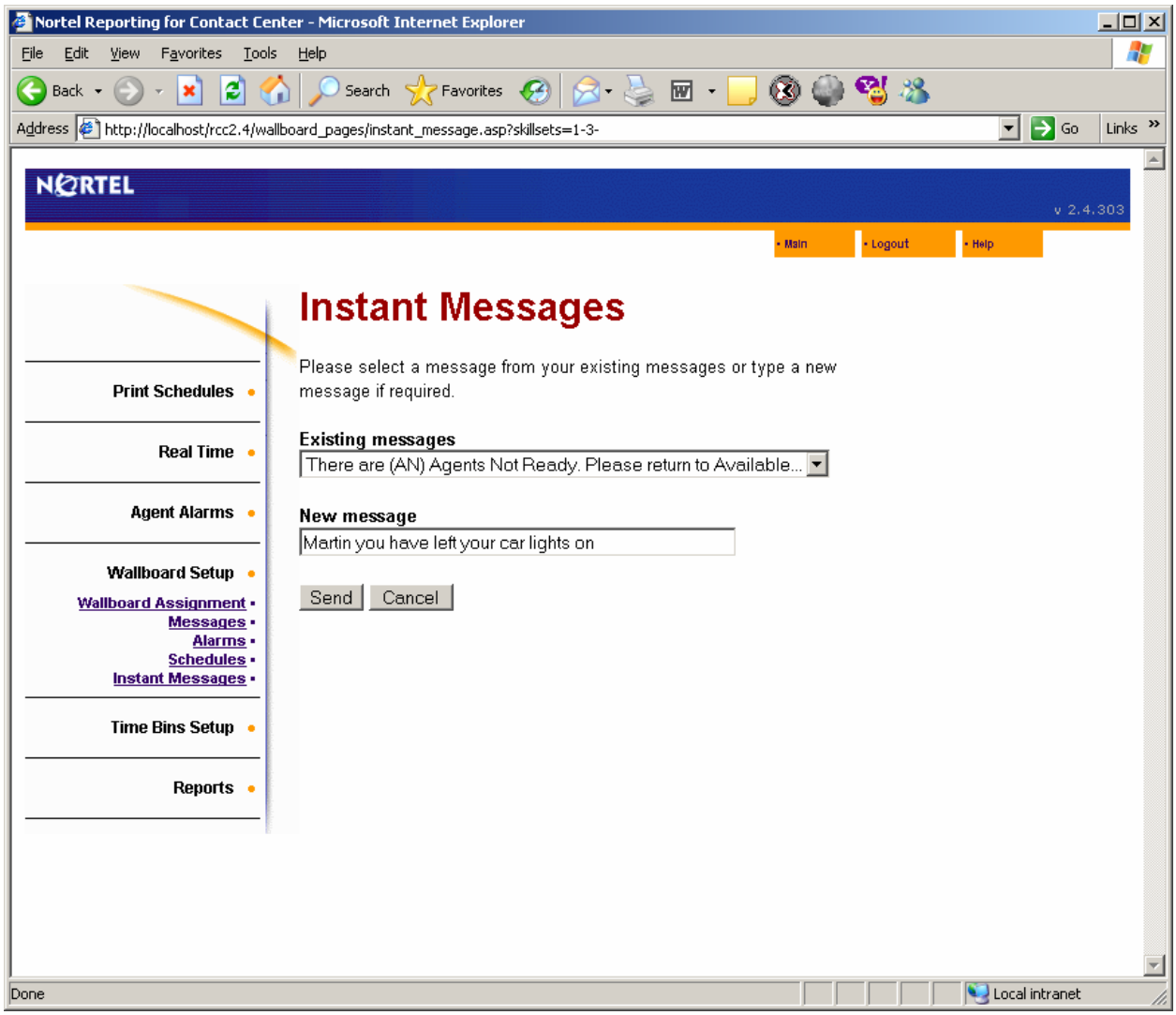


Figure 118: Composing an Instant Message

You can send an existing stored message or create a new message.

Follow these steps to create and send an Instant Message:

1. To send an existing message, select the stored message from the **Existing** messages list. To create a new message, type the new message in the **New Message** field.

2. Click **Send** to send the message to the wallboards.

- If the New message field does not contain any text, the displayed message in the Existing messages list is sent to the wallboards.
- If the New message field contains text, that text is sent to the wallboards.

In either case, the Instant Messages page appears after you click **Send**.

3. Click **Cancel** to return to the Instant Messages page without sending an Instant Message.

Note: You can include parameter abbreviations in brackets in the text of the new message. When the message is displayed, the abbreviations are replaced with the correct numerical value for the parameter. (For more information about parameter substitution, refer to page 133.)

Time Bins Setup

The Time Bins option allows you to specify the settings for the Answer and Abandon Time Bins for the Skillsets that are assigned to you. Answer and Abandon Time Bins are collectively known as the Time Bins.

Answer Time Bins

The Answered Time Bins are a series of six time steps used in the statistical analysis of Answered Calls. Nortel Reporting for Contact Center provides statistical reports on the percentage of incoming calls answered within each of the periods specified in the chosen Answered Time Bins.

A seventh Answer period is also used in the reports. The seventh period gathers information about all calls that are answered after the period specified by the sixth Answered Time Bin.

Abandon Time Bins

The Abandon Time Bins are a series of six time steps used in the statistical analysis of Abandoned Calls. Nortel Reporting for Contact Center provides statistical reports about the percentage of incoming calls abandoned within each of the periods specified in the chosen Abandoned Time Bins.

A seventh abandoned period is also used in the reports. The seventh period gathers information about all calls that are abandoned after the period specified by the sixth Abandoned Time Bin.

Note: If other Users have been assigned these Skillsets, they can change these settings.

Select the **Time Bins Setup** option to view the Time Bin Setup page, shown in Figure 119: Time Bin Setup Skillset selection page.

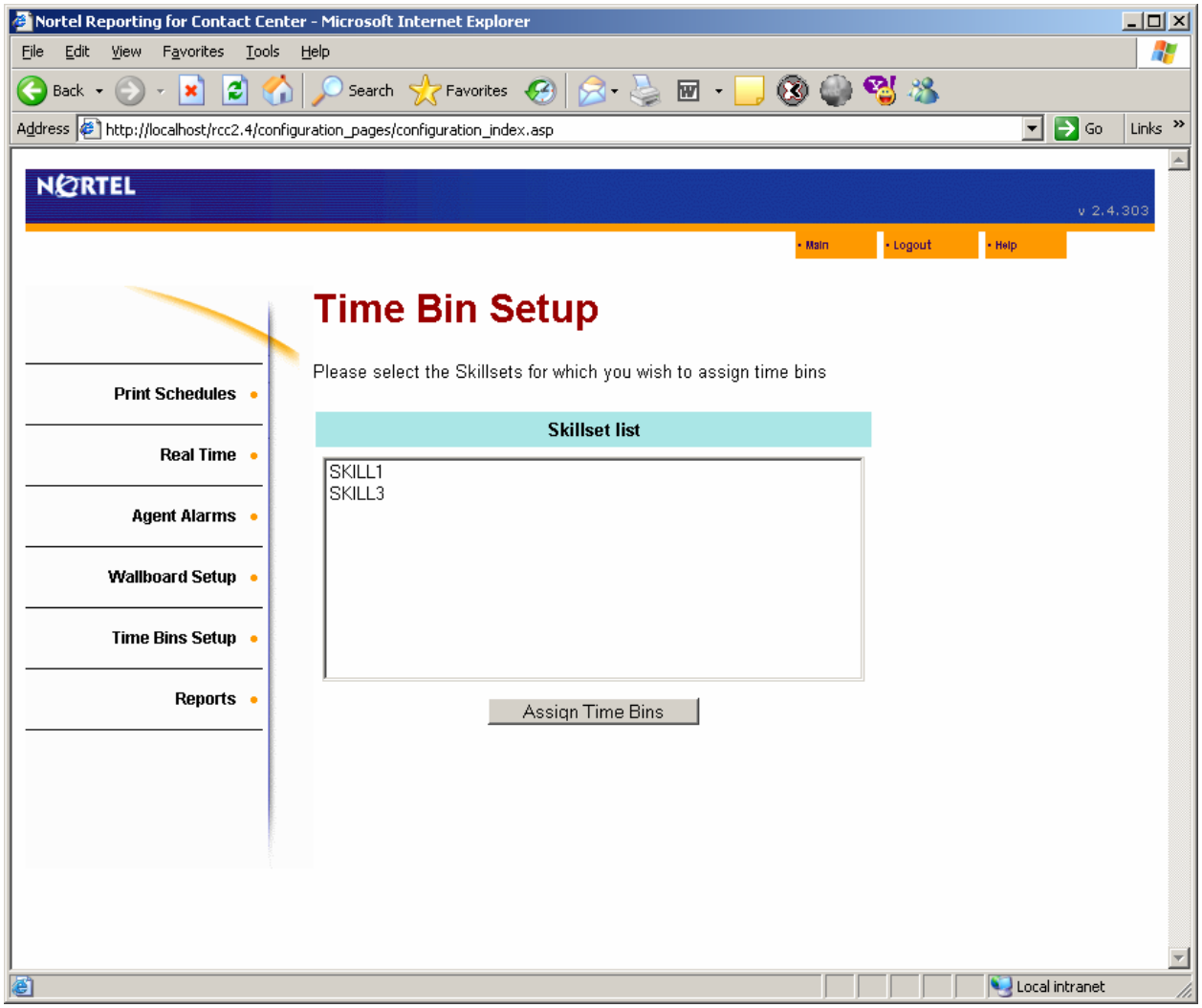


Figure 119: Time Bin Setup Skillset selection page

The Time Bin Setup Skillset selection page allows you to select a Skillset for which you wish to set Time Bin values. Note that the list of available Skillsets in Figure 119: Time Bin Setup Skillset selection page contains only those Skillsets that the Administrator assigned to the User.

Follow these steps to set Time Bin values for Skillsets.

1. In the **Skillsets** list, click any Skillsets to select the Skillset for which you wish to set the Time Bin values.
2. Click **Assign Time Bins**. The Time Bins values page shown in Figure 120: Time Bins page appears.

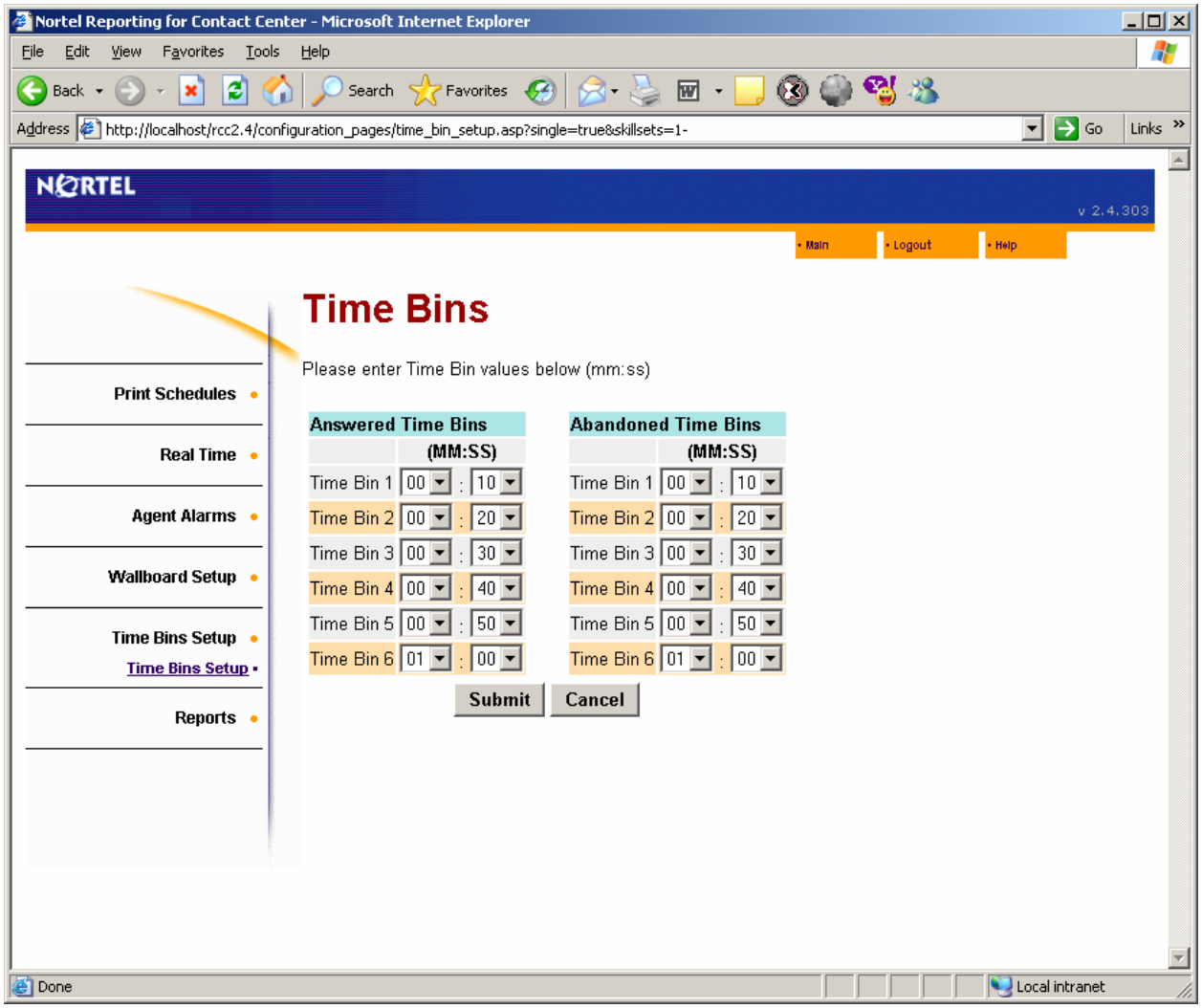


Figure 120: Time Bins page

3. In the **Answered Time Bins** and **Abandoned Time Bins** lists, enter the time required to define the periods into which you wish to have calls that are answered or abandoned in these Skillsets categorized.

   The steps in the Time Bin periods need not be the same, but you must set the Time Bin periods in ascending order.

   For example, if you want to have Nortel Reporting for Contact Center report on Answered calls, grouping together the calls that were answered within 10 seconds, the calls that were answered between 10 and 20 seconds, the calls that were answered between 20 and 30 seconds, the calls that were answered between 30 and 40 seconds, the calls that were answered between 40 and 50 seconds, the calls that were answered between 50 seconds and one minute, you would set the Time Bins as 00:10, 00:20, 00:30, 00:40, 00:50, and 01:00.

   Note that Nortel Reporting for Contact Center also includes a category for anything greater than the last time period, which in this example would be anything answered after 01:00.

4. Click **Submit** to save your settings.

   To close the Time Bins page without saving your changes, click **Cancel**. The Time Bin Setup page shown in Figure 119: Time Bin Setup Skillset selection page appears.

Reports 6

Reports Introduction

General

Nortel Reporting for Contact Center provides a set of flexible and easy-to-understand reports. The reports contain information about the call traffic in and out of your Contact Center and about the activities of your Contact Center Agents.

Reports Explained

Detailed information on the Reports within Reporting for Contact Center can be found in the *Reporting for Contact Center – Reports Explained* (NN40010-600) guide (installed along with this guide on the Web Host PC). This guide details how to use the report viewer, the terms used within Reporting for Contact Center reports, what statistics and formulas are used to calculate each field in the reports (where applicable) and frequently asked questions.

Using the Reports

!	Ensure that the PC with CCRS installed for a BCM50 2.0 system is switched on at all times when the Contact Center is running so that all statistics are collected. If it is not switched on, this will result in a loss of call data that is required for the reports.

To access the reports in Reporting for Contact Center from the Main Menu page, as shown in Figure 69: User Main Menu page, select **Reports** to view the Report Menu page, see Figure 121: Reports menu page.

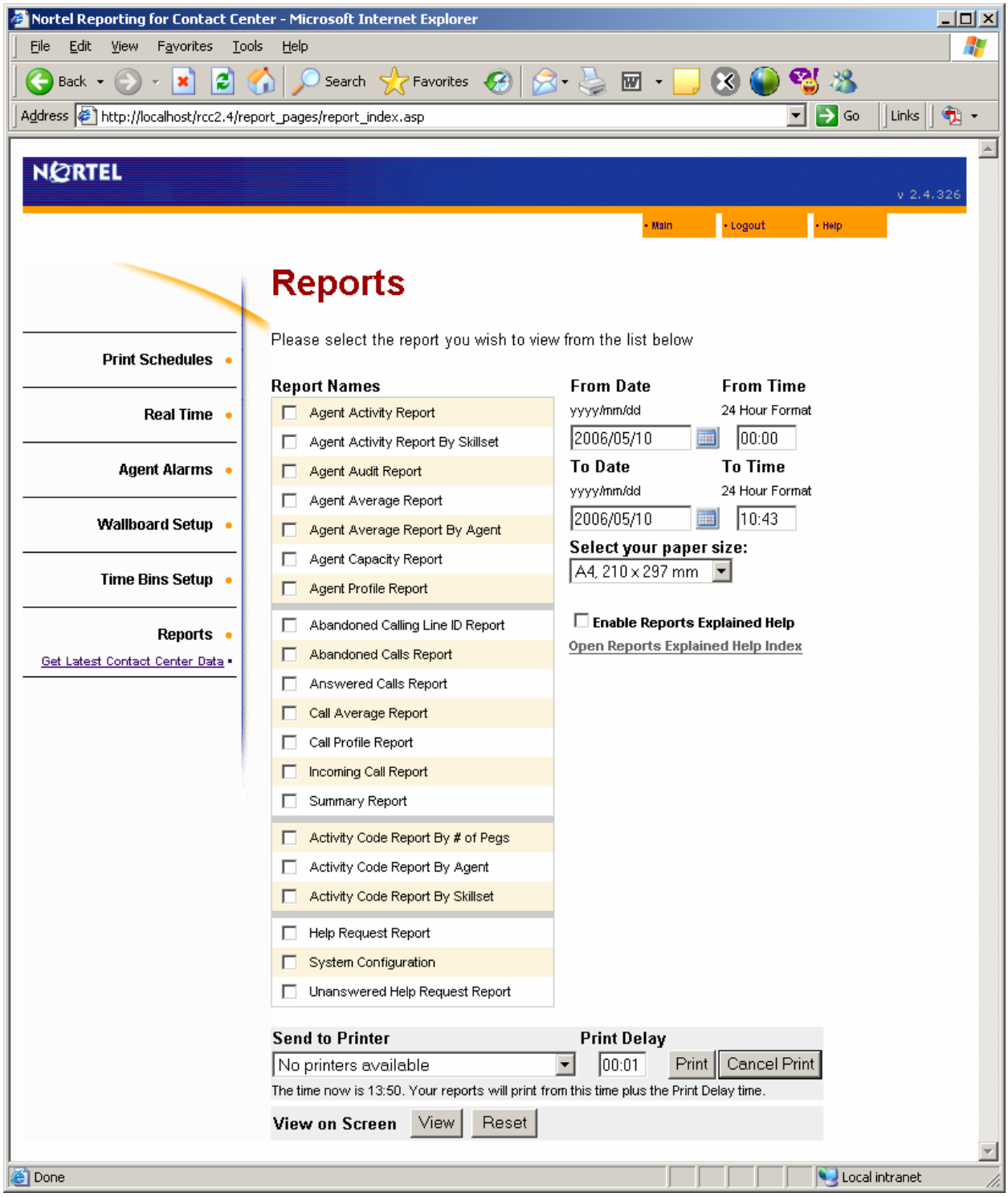


Figure 121: Reports menu page

Under **Report Names** each report is grouped according to its type, these are in order:

- Agents: reports related to Agent activity and traffic
- Calls: reports related to calls
- Activity Codes: reports related to activity codes
- Miscellaneous: all other reports, such as the System Configuration report

Follow these steps to obtain a report:

> **Note**: Due to licensing restrictions, only 2 Client PCs can view the reports concurrently and a maximum number of 5 reports can be generated at a time.

1. From the **Report Names** list of reports, select the appropriate check box for each report you wish to generate.

   Note: Most reports require selecting Skillsets, Agents, Activity Codes, or any combination of these. The only reports that do not require these selections are Help Request Report, Unanswered Help Request Report, and System Configuration. For information about selecting Skillsets, refer to Selecting Skillsets. For information about selecting Agents, refer to

Selecting Agents. For information about selecting Activity Codes, refer to Selecting Activity Codes.

2. Next to the **From Date** and **To Date** fields click the calendar icon and specify a date. See Figure 122: Selecting a Date Range. A maximum date range of one year can be selected. Use the arrows buttons, such as **<<Year**, to change the year and month of the calendar.

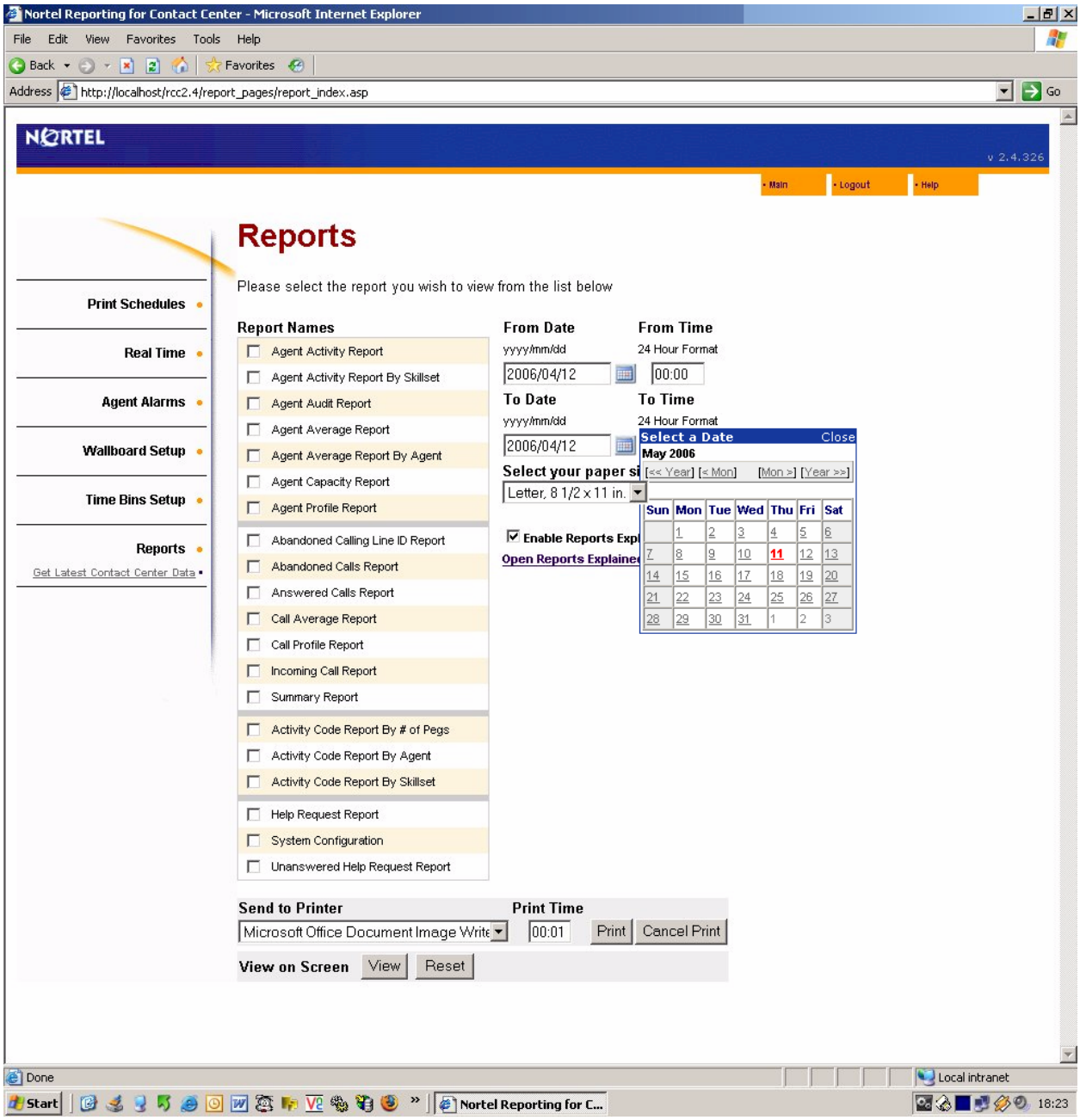


Figure 122: Selecting a Date Range

3. Use the **From Time** and **To Time** fields to specify the time range for the report. Click each field and enter the time, in the 24-hour format. For example, enter 08:00 for 8:00 a.m. and 14:00 for 2:00 p.m.

4. If you intend to view your reports on screen, select the paper size of your printer from the **Select your paper size** list. The two available settings are A4 and Letter.

   You can determine which paper size is applicable by viewing the properties of your printer (as most printer properties are different, consult your printer documentation or manufacturer for further assistance). Typically, you can locate information about your printer from **Control Panel**. Select **Printers and Faxes**, locate your printer, right-click, and select **Properties**.

   Note: Even if you do not have a printer attached to your PC you must select a paper size (if this is the case, you can select either paper size).

   Note: You do not need to select a paper size if you intend to send your reports directly to the printer or save to file.

5. To send the reports directly to a printer select a printer from the **Send to Printer** list, and click **Print** to send the report to that printer. Enter a print delay time in hours and minutes in the **Print Delay** field to print those reports up to 24 hours in the future, for example if the current time is 12:30 and you specify 3:30 in the **Print Delay** field your reports will in fact print at 16:00 that day. If you specify 23:00 your reports will print at 11:30 the following day. Note that 23:59 is the maximum you can enter in this field and 00:01 is the minimum.

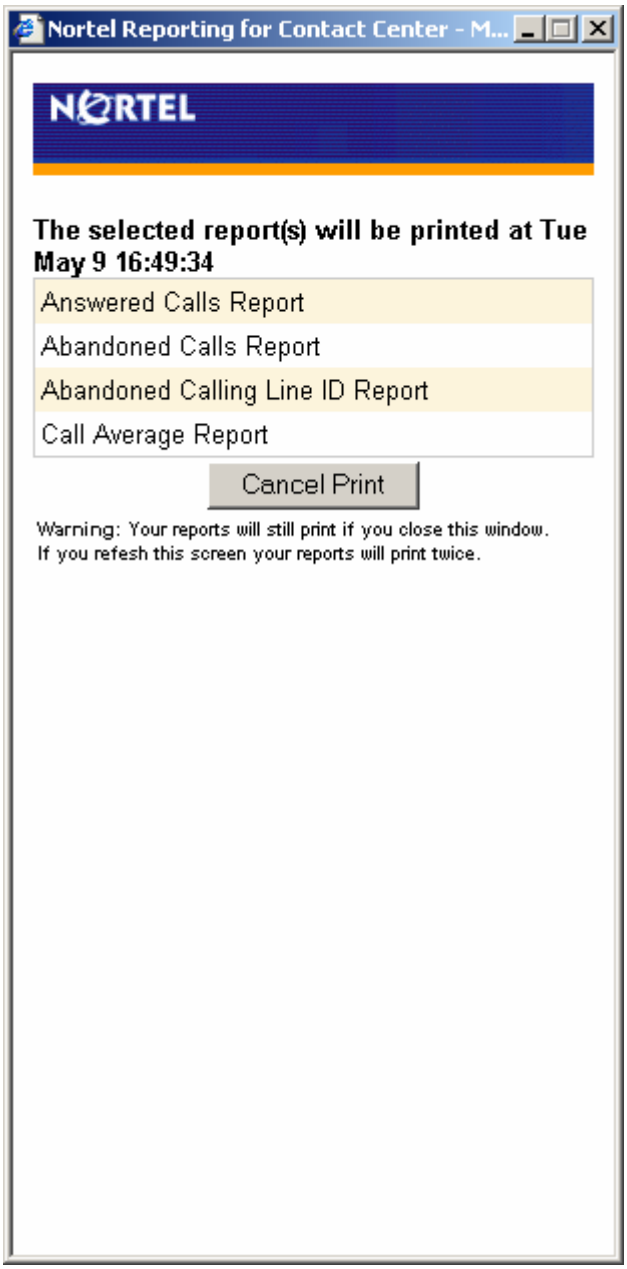


Figure 123: Print Status page

Note: You can print only to printers that are configured and attached to the Web Host PC.

6. To cancel printing, click **Cancel** before the reports are due to print.
   Note: If you close the Print Status screen, your reports will still print unless you clicked **Cancel**.

7. If you have closed the print status page and wish to cancel the print, click on the **Cancel Print** button, this will open a new window containing a list of reports waiting to be printed, the date and time they are due to be printed and a link to cancel the report. Each report can be canceled in turn but to cancel all reports click the **Cancel All** button at the bottom of the page. If there are more reports than can be displayed in this window a scroll bar will appear on the right hand side, use this to scroll through all reports waiting to print.

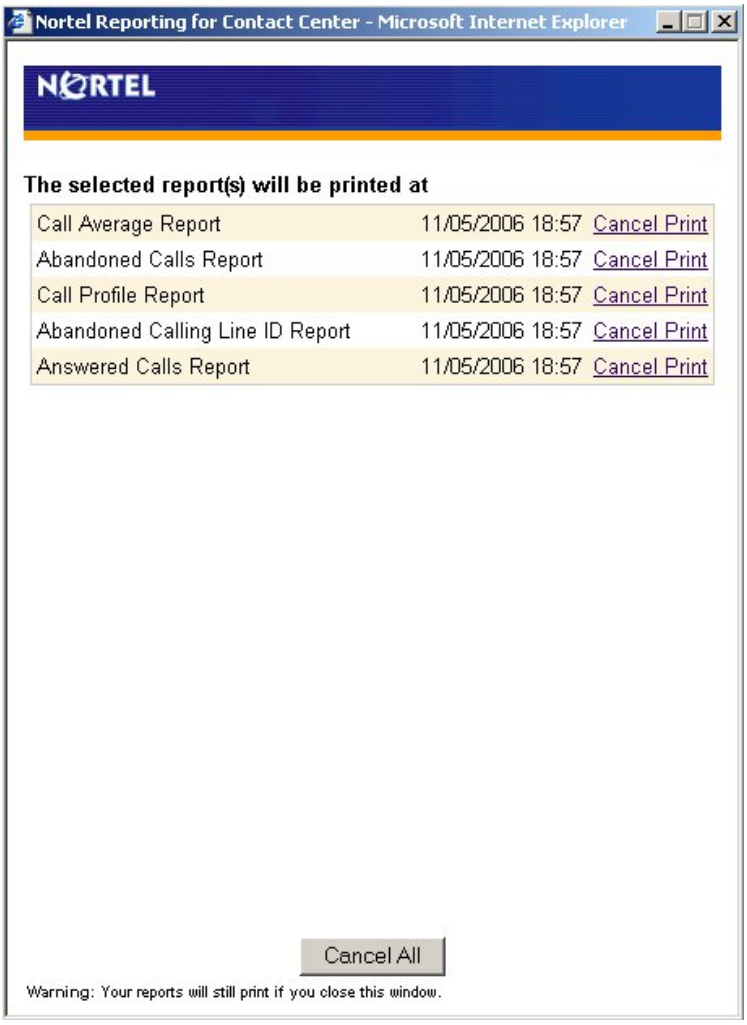


Figure 124: Cancel Print page

8. To view reports on screen, click **View** in the Reports menu page, see Figure 121: Reports menu page.
9. After you select skillsets and (where applicable) agents and activity codes, the Opening Report(s) window appears. This displays the status of your report generation, see Figure 125: Opening Report(s) window.

   Each report is launched sequentially and as each report is successfully generated, the Opening Report(s) window shows the current progress. See Figure 125: Opening Report(s) window.

Note: If you close the Opening Report(s) window, your remaining reports with the status **Pending**, will not be generated.

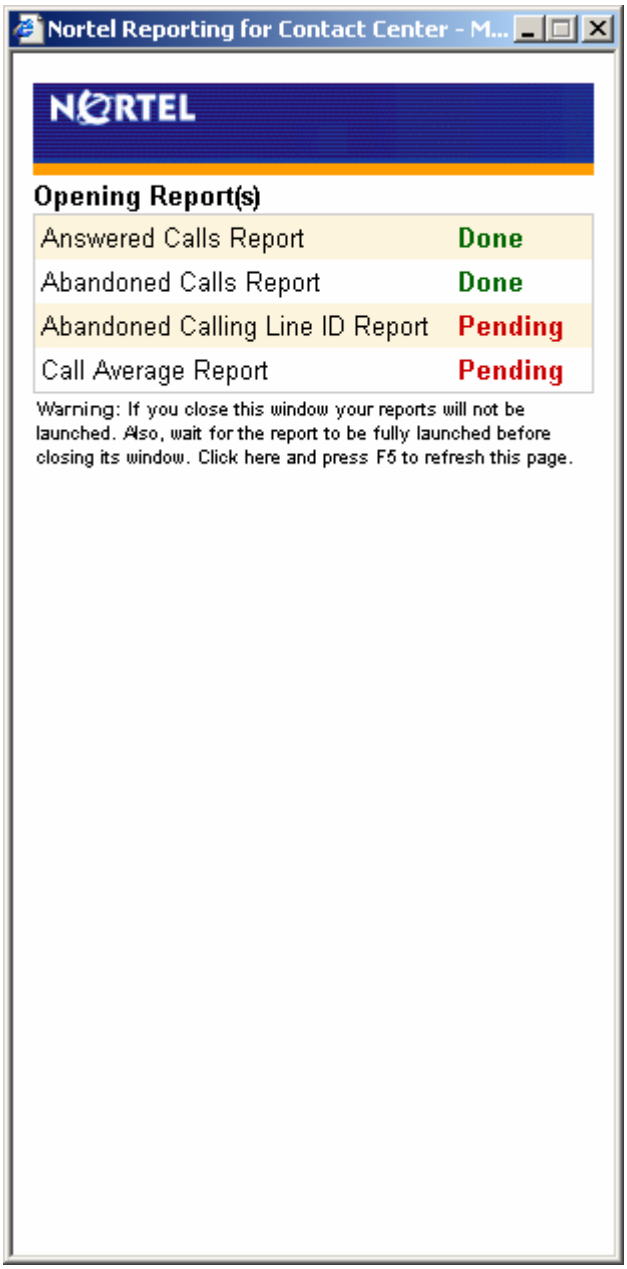


Figure 125: Opening Report(s) window

Selecting Skillsets

If you select to generate any of the following reports, you must choose the Skillsets for which you want the reports generated:

- Answered Calls Report
- Abandoned Calls Report
- Abandoned Calling Line ID Report
- Agent Capacity Report
- Call Average Report
- Agent Average Report
- Agent Profile Report
- Agent Activity Report
- Agent Audit Report

- Activity Code Report by Skillset
- Activity Code Report by Agent
- Activity Code Report by # of Pegs
- Summary Report
- Call Profile Report
- Incoming Call Report
- Agent Activity Report By Skillset
- Agent Average Report By Agent

If you select to generate one of the reports in the list, the Select Skillsets page shown in Figure 126: Select Skillsets page appears.

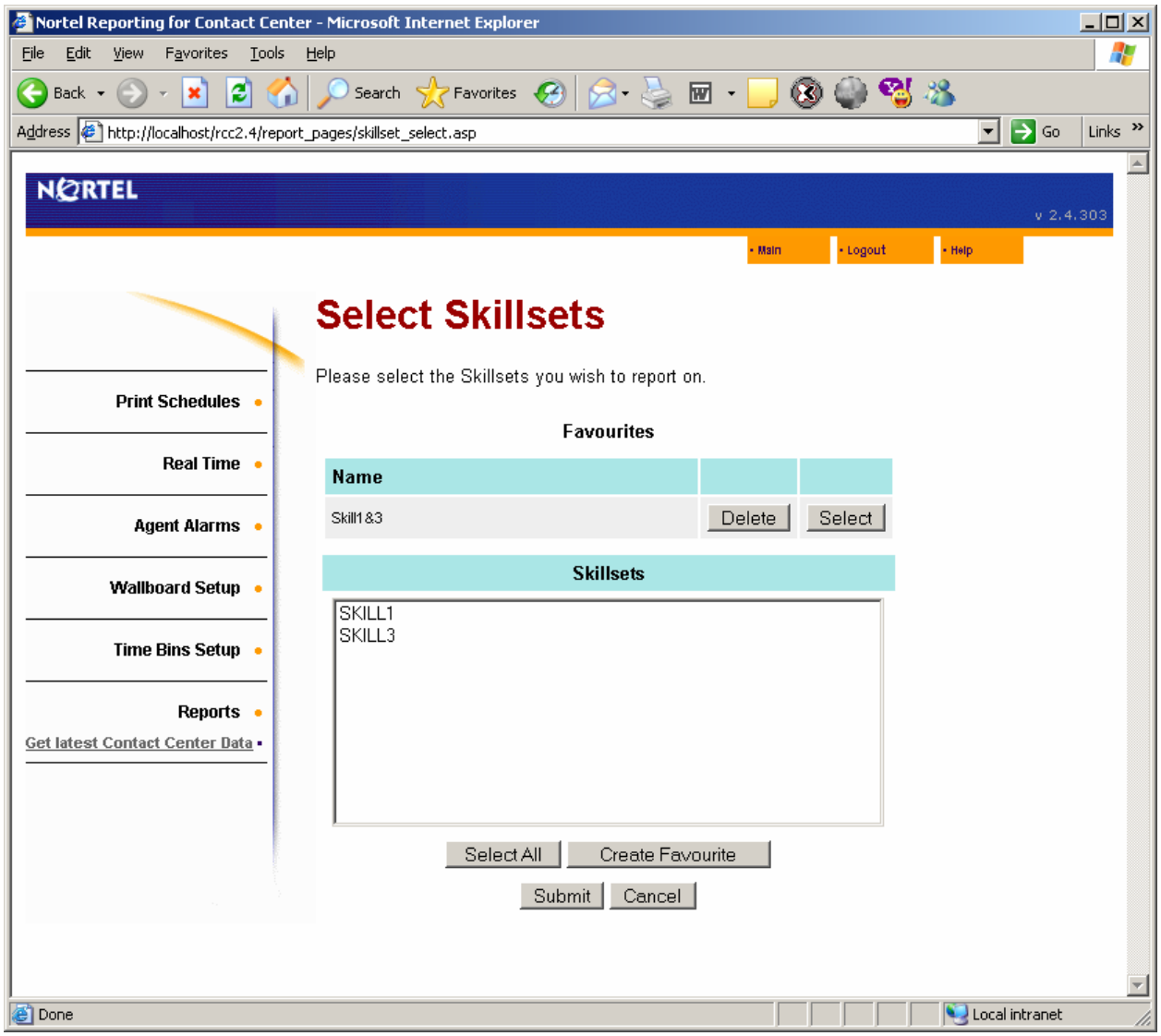


Figure 126: Select Skillsets page

- For information about using Skillset selection lists, see page 92.
- For information about using Favorites, see page 92.

Selecting Agents

If you select to generate the Agent Audit Report, you must select the Agents for which you want to generate the report. The Select Agents page shown in Figure 127: Select Agents page appears.

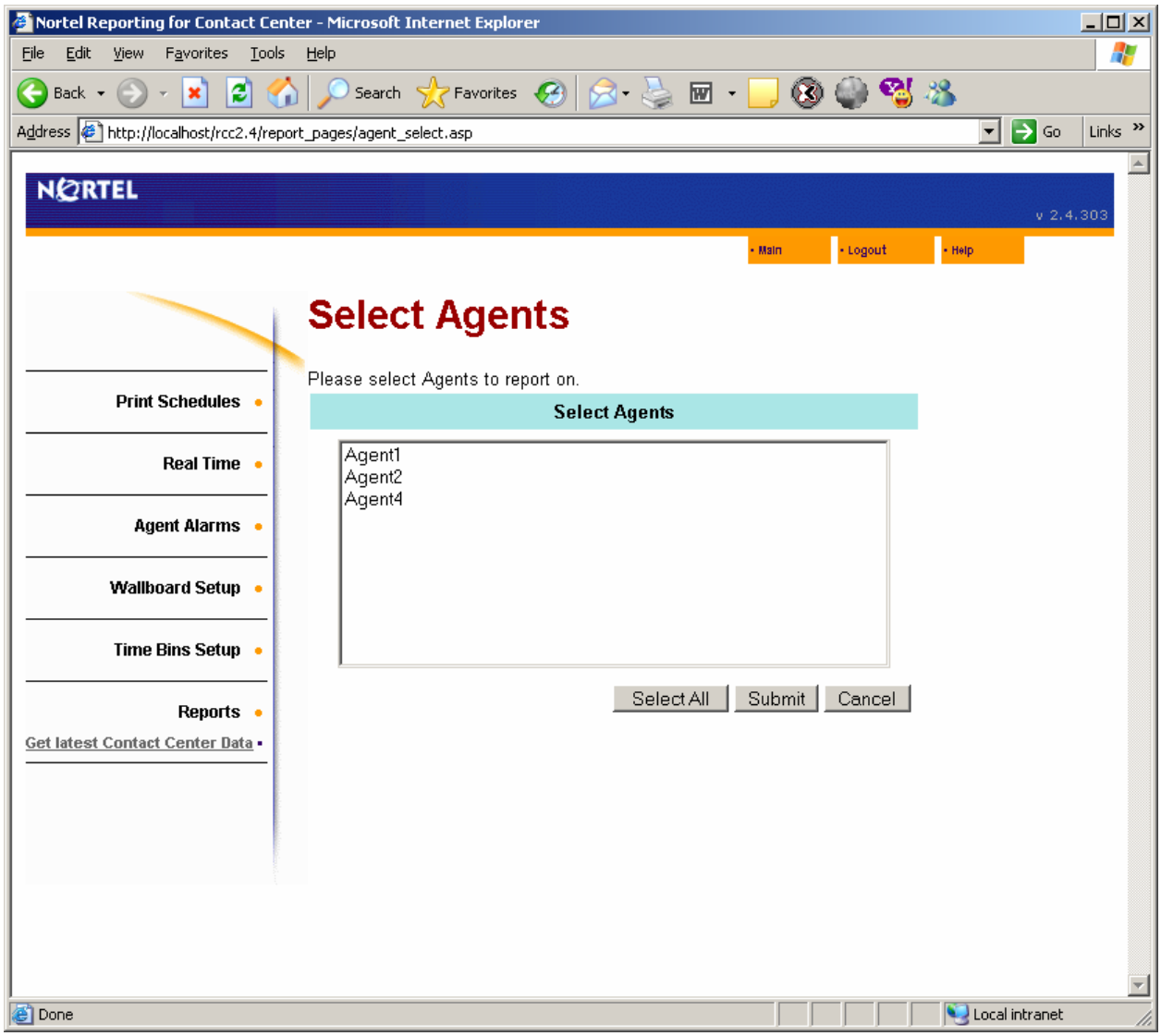


Figure 127: Select Agents page

Use the following techniques to select Agents from the Agent List:

- Click an unselected Agent name once to select it (it will be highlighted) and remove the highlight from any other currently selected Agents.
- Click a selected (highlighted) Agent name once to unselect it. Note that if other Agents are selected and you click an Agent name, you unselect all the other Agents except the Agent name you clicked.
- To select multiple Agents, press **Ctrl** and select multiple Agents.

- To select a range of Agents, click an Agent at the beginning (or end) of the range, press the Shift key, and click the Agent at the end (or beginning) of the range.

You can also click **Select All** to select all the Agents at once.

Selecting Activity Codes

If you select to generate any of the following reports, you must choose the Activity Codes for which you want the reports generated:

- Activity Code Report by Skillset
- Activity Code Report by Agent

The Select Activity Codes page shown in Figure 128: Select Activity Codes page appears.

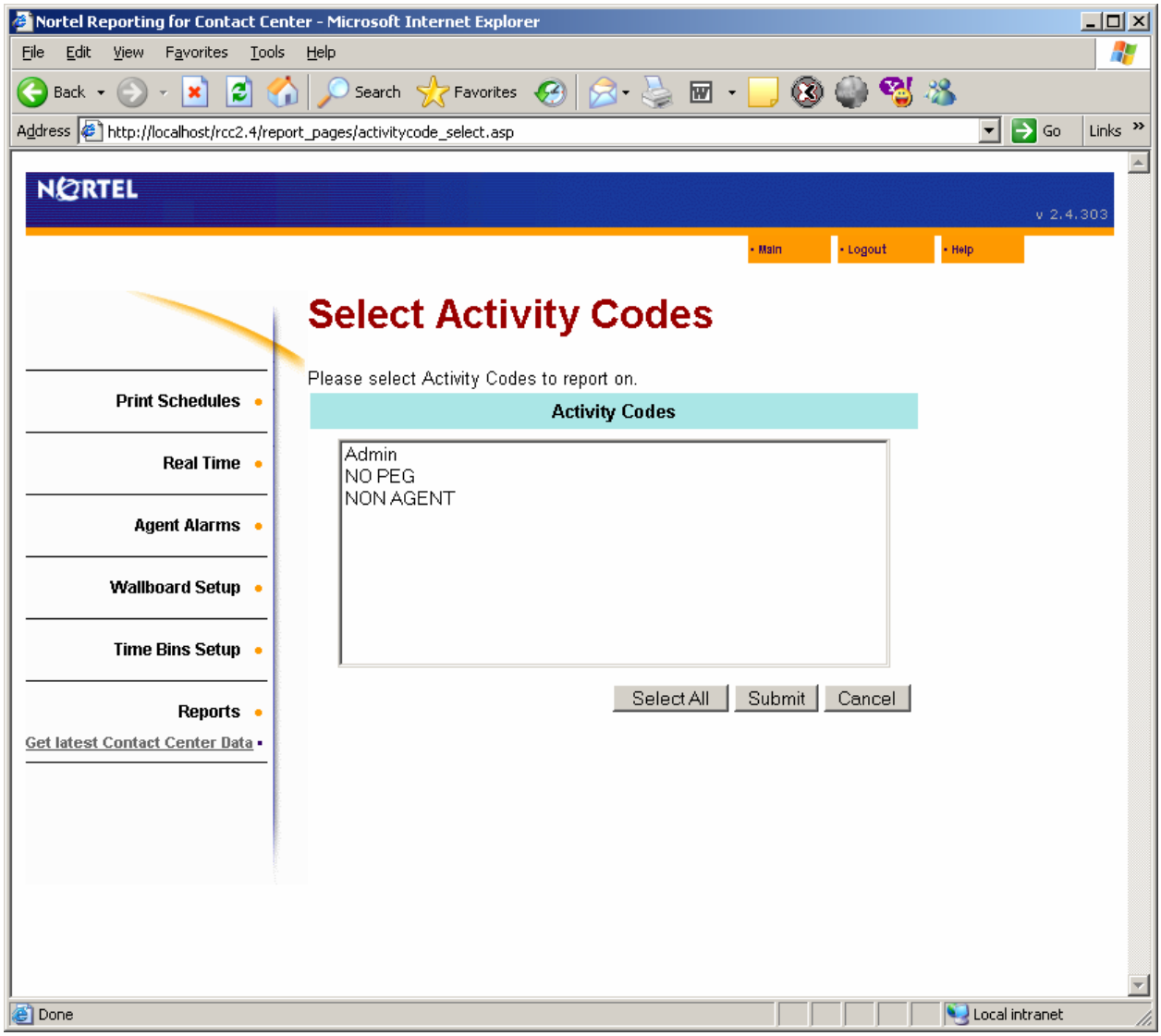


Figure 128: Select Activity Codes page

Use the following techniques to select Activity Codes from the Activity Code List:

- Click an unselected Activity Code once to select it (it will be highlighted) and remove the highlight from any other currently selected Activity Code.
- Click a selected (highlighted) Activity Code once to unselect it.

  Note: If any other Activity Codes are selected and you click an Activity Code, you unselect all the other Activity Codes except the Activity Code you clicked.
- To select multiple Activity Codes, press **Ctrl** while you select multiple Activity Codes.
- To select a range of Activity Codes, click an Activity Code at the beginning (or end) of the range, hold down the Shift key, and click the Activity Code at the end (or beginning) of the range.

You can also click **Select All** to select all the Activity Codes at once.

Get Latest Contact Center Data item

From the **Reports** menu, choose the **Get Latest Contact Center Data** item, see Figure 121: Reports menu page (page 166), to request the most recent report data from the Contact Center.

For example, if you specified that Nortel Reporting for Contact Center should poll the Contact Center every 30 minutes for report data, clicking Get Latest Contact Center Data ensures that the most recent data is received from the Contact Center before the reports are generated. Any Contact Center activity that has occurred since the last Report Data update is included in the reports.

When you click **Get Latest Contact Center Data**, the screen shown in Figure 129: Get Latest Contact Center Data appears. This screen shows the number of seconds remaining until the latest data is obtained from the Contact Center.

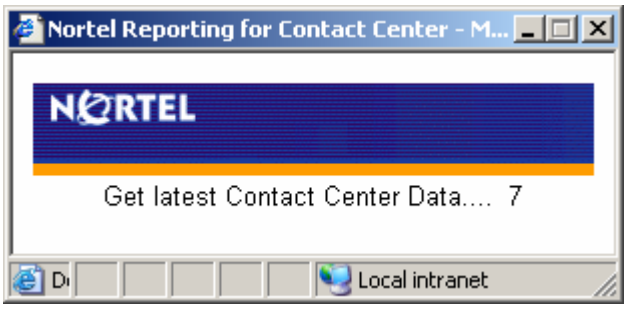


Figure 129: Get Latest Contact Center Data

To reset the timer, click **Get Latest Contact Center Data** again while the screen is open. By having the data request timer reset in the same screen prevents the User from making multiple repeated and rapid data requests from the Contact Center.

Glossary 9

Abandoned Calls..... Abandoned Calls are calls that ring in to the system and the incoming caller clears down the call because they do not wish to wait any longer before they are answered. These calls have not been handled by humans or by voice mail.

Abandon Time Bins... A series of six time steps used in the statistical analysis of Abandoned Calls. Nortel Reporting for Contact Center will provide statistical reports on the percentage of incoming calls abandoned within each of the periods specified in the Abandoned Time Bins. A seventh period is also used in the reports, which gathers information on all calls which abandoned after the period specified by the sixth Abandoned Time Bin.

Administrator..... A Nortel Reporting for Contact Center User who has been awarded Administration rights. These Users can configure core elements of Nortel Reporting for Contact Center that standard Users can not, and they can perform such actions as creating other Users.

Alarm Threshold..... Alarms may be set to trigger an alert on the wallboards, to inform your Agents of some event or circumstance. The value that a parameter must reach, match or exceed to trigger an Alarm is the Alarm Threshold.

All Calls Held ..... If an Agent has placed all of their calls on hold, so that they have no active calls, they will be shown in magenta in the Real Time screens.

Answered Time Bins.. A series of six time steps used in the statistical analysis of Answered Calls. Nortel Reporting for Contact Center will provide statistical reports on the percentage of incoming calls answered within each of the periods specified in the Answered Time Bins. A seventh period is also used in the reports, which gathers information on all calls that were answered after the period specified by the sixth Answered Time Bin.

Available State..... The Agent is ready to take Incoming Calls. The Available State is shown as blue in the Real Time Screens.

Break Time..... The period allocated to Agents following clear down of an Incoming Contact Center Call (also known as *Wrap Up* and *Post Call Completion*). Break Time is displayed in the Real Time Screens as dark green.

Calls Answered..... *Answered* means the Call was not abandoned, and it did not require the involvement of another Skillset in the handling of the call.

Calls Presented..... The count of all the calls presented to a Skillset, both Direct (a normal Contact Center call delivered straight into the Skillset) and Indirect (the Call arrived in the Skillset in some other way).

Direct Call..... From the point of view of any given Skillset, Direct Calls are calls that were presented directly to that Skillset. That is, the incoming caller was handled by the Call Routing and was presented by the Call Routing directly to the Skillset in question.

Calls Handled In Another Skillset ..... Calls that have left a Skillset and entered another Skillset because of an Overflow Rule or any other Routing Condition or Step. The fate of these calls is then recorded in the reports for the Skillset they have moved to – not in the Skillset they leave.

Indirect Call ..... From the point of view of any given Skillset, Indirect Calls arrive in the Skillset after being handled by the Call Routing or Agents of another Skillet. For example, they may have overflowed from another Skillset or may have been manually transferred to the Skillset queue by an Agent from another Skillset. Therefore, a Call arriving into a Skillset that is not a normal Contact Center Call presented directly to the Skillset (as described in the definition of a Direct Call) is counted as an Indirect Call. Whether the call overflowed to the Skillset in question, or was moved to the Skillset by the Move to Queue Call Routing step, or whether it was manually transferred to the Skillset Control DN, it is counted as an Indirect Call.

Grade of Service ..... The Grade of Service is a figure that is used to represent the level of service provided to incoming callers, based upon Contact Center response times. It is calculated as follows:

```
Presented    = Total Number of Direct Call
               transactions Presented to the Skillset
Abandoned    = Calls which Abandoned
>Secondary   = Calls transactions answered after the
               Secondary Alert

G of S% =  Presented – Abandoned – >Secondary   x 100
                        Presented
```

Incoming State ..... The Agent is engaged on an Incoming Contact Center Call, either a PSTN or a Multimedia call. The Incoming State is shown as green in the Real Time Screens. If an Agent has been on an Incoming Call in excess of the Incoming Call Duration Threshold their timer will be displayed against a red background.

Multimedia Call ..... A call generated and conducted through the use of Nortel Multimedia Contact Center. This call may involve a Follow-me browser session, a Chat session or was initiated by a caller clicking a button on a Web page.

Non-Contact Center

Call State ..... Grey is used for non-Contact Center calls.

Not Ready State ..... Either the Agent has invoked the Make Not Ready feature to indicate they are not available to take calls or the Contact Center has placed them in the Not Ready state because a call was unanswered at their handset or the Agent is active on an internal call. The Not Ready State is shown as dark grey in the Real Time Screens. If an Agent has been Not Ready in excess of the Not Ready Duration Threshold their timer will be displayed against a red background.

Outgoing State ..... The Agent is engaged on an Outgoing Call. The Outgoing State is shown as yellow in the Real Time Screens. If an Agent has been on an Outgoing Call in excess of the Outgoing Call Duration Threshold their timer will be displayed against a red background.

PSTN Call ..... Public Switched Telephone Network Call – a voice call.

Real Time..... Information is available that displays the current states of Skillset Calls and Agents. This information is refreshed approximately every 3 seconds. These displays are called the Real Time Screens. Information can also be displayed on hardware and software TCP/IP enabled wallboards, to provide Real Time information to the Contact Center Agents.

Stat Time Bins..... A collective term for the Abandoned Time Bins and the Answered Time Bins.

Supervisor Monitoring If a Supervisor is monitoring an Agent the Supervisor is displayed in the Real Time screen. The Status column will display **Monitoring** with a gold background.

TCP/IP..... Transmission Control Protocol/Internet Protocol: a protocol developed by the US Department of Defense for communications between computers. It has become the *de facto* standard for data transmission over networks, including the Internet. TCP and IP are transport and address protocols; TCP is used to establish a connection for data transmission, and IP defines the method for sending the data in packets.

Title..... A string of text displayed on the top line of a wallboard. This restricts the wallboard to being able to display three parameters only.

User..... A User is a person who has been allocated a Username and Password to allow them to use Nortel Reporting for Contact Center. Users can configure some elements of their usage of Nortel Reporting for Contact Center, but they do not have the same scope for configuration as an Administrator.

Unstaffed Calls..... Calls that were presented to the Skillset when there were no Agents logged in to handle those calls.

Wallboard..... This is a device that is used to display Contact Center statistics and messages to the Agents and other Contact Center staff. Nortel Reporting for Contact Center TCP/IP enabled Hardware Wallboards and SoftBoard from the *ip***View** range of wallboards.

References 10

1 *Keycode Installation Guide* (NN40010-301), Document Version 02.01, September 2006
2 *Reporting for Contact Center – Reports Explained* (NN40010-600), Document Version 03.01, September 2006
3 *Contact Center Set Up and Operation Guide* (NN40040-301), Document Version 01.01, September 2006
4 *Reporting for Contact Center Troubleshooting and Maintenance Guide* (NN40020-402), Document Version 02.01, September 2006

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